Changes for June 2013

- Screenshots were updated throughout the manual.
- Logo and ADP were updated to reflect department name change.
- Instructions were modified in the following sections: Login Procedure, Identify Programs, Report Single Services, Identify Recurring Services, Report Recurring Services, Standard Reports, Evaluation modules, Report Builder, and Data Export
- Tips were added/updated in the following sections: Standard Reports, Report Single Services, Identify Recurring Services, Data Export

Changes for July 17, 2012

- Live Data and Training site URL links updated
- Screenshots were updated on the following pages: Home page (Progress tracker), Reporting Single Service, Knowledge base (FAQs, Multimedia, Contact Support).
- Instructions were modified on the following pages: Reporting Single Services (duration of service).
- Tips added to in Add New Single Service(EBP message), Edit Goals, Edit Objectives, Reporting Recurring Services (6th service update demographics).
- Deleted old Contact Support

Changes for June 18, 2012

- Screenshots were updated on the following pages; Login pages, Home page (Progress tracker, updated calendar), Identify Groups, Identify Programs, Upload Strategic Plan.
- Instructions were modified on the following pages: Login pages, Home page, Identify Programs.
- Note added to Add New Single Service.
- Knowledge Base section – deleted Prevention 101, added FAQs, Multimedia and Contact Support

Changes for November 11, 2011

- Screenshot was updated in County/Provider Permissions

Changes for September 30, 2011

- Instructions were modified for the following pages: Identify Recurring Services, Report Recurring Services

Changes for September 7, 2011

- Instructions were modified for the following pages: Home, County/Provider Profile, Coalition/Partnership Member, Upload Strategic Plan, Goals, Objectives, Identify Programs, Identify Groups, Adding Demographic/Non-Demographic Information, Events Manager
- Screenshots were updated for the following pages: Home, County/Provider Profile, Coalition/Partnership Member, Upload Strategic Plan, Goals, Objectives, Identify Groups, Report Single Services, Report Recurring Services, Events Manager, Data Export
- Problem Statements was moved to the Planning module
- Tips were added to the following pages: Deleting an Uploaded Strategic Plan, Report Recurring Services
- Instructions for Transfer Groups have been removed
- Manual formatting was updated throughout

Changes for August 30, 2010

- All dropdowns for CSAP strategies are sorted by service code number and not strategy category.
- Problem Statements can no longer be deleted.
- Problem Statements titles and descriptions can no longer be edited.
- Goals and Objectives can no longer be deleted.
- Goal and Objective descriptions can no longer be edited except for Start and Complete By dates.
- In the Report Goal Progress/Results in the evaluation module, you can now choose to filter the list by Active or Cancelled or Completed to make finding progress reports easier.
- On the report single service and report recurring service listing page, you can now go directly to the program description page by clicking on the program name on the single or recurring service listing page.
- On the FAQ page on the support site, you can now view or print out each FAQ with its response. The link is under the “Printable FAQ” section on the Frequently Asked Question page.
- Added ability to download standard reports in “RAW DATA” format. This will load into excel each detail record used to create the summary or aggregated report.
- Non-Demographic Service names may have been changed or deleted to make consistent with DHCS service names.
- You now have the ability to upload multiple strategic supporting documents to each Plan Name. You can no longer delete a plan name, but you may remove supporting uploaded documents to the plan.
- County can now require providers to track attendance on all recurring services.

Changes for July 30, 2009

- Users can now search for services by service id number. See the new module under Implementation-Service Search.
- Additional save and cancel buttons have been added to the top of all pop-up panels such as staff time and demographic information.
- Demographic counts of groups and single service attendees can now be identified as “Actual” or “Estimated”.
- FNL participants can now be identified as mentors or protégés.
- There is now a bread crumb trail with page numbers in the standard reports section rather than just the next and previous buttons.
- Groups are no longer allowed to transfer from 08/09 into 09/10. Please re-create any existing groups as new groups.
- DHCS can now easily add documents to the library. Check this section frequently. You may also see that the library documents can now be linked in the messages section on the home page.

Changes for January 1, 2009

- Manual Update: Converted to new layout

Changes for September 2, 2008

- Added or modified instructions for the following pages: Transfer Programs, Transfer groups, Transfer Participants, Transfer Identified Recurring Services
- Screenshots were added for the following pages: Transfer Programs, Transfer groups, Transfer Participants, Transfer Identified Recurring Services
- Tips were added or modified to the following sections: Transfer Programs

Changes for July 7, 2008

- Added definitions for Custom Permission levels on the Staff page
- Screenshots were updated for the following pages: Problem Statement, Coalition/Partnership Subcommittees, Identify Programs, Editing an Objective, Editing Participant Information, Editing Single Service Events, Information Dissemination Demographics, Editing Recurring Strategies, Report Recurring Service Events, Service Review, Data Export, Prevention 101
- Added or modified instructions to the following pages: Problem Statement, Identify Groups, Single Service Events, Report Recurring Service Events, Report Goal Progress/Results, Report Objective Progress/Results
- Tips were added or modified to the following sections: Identify Programs

Changes for August 30, 2007

- FNL providers are now able to track their FNL information (i.e., FNL staff, programs, services, etc. See Appendix.)
- A secondary contact can be added to the County/Provider Profile under the Administration Module.

Changes for June 25, 2007

- Added note about the remove button for demographic and non-demographic information.
- The screen shot was updated in Single session and an added instruction for tracking participant attendance was also added.
- An additional tip was added to recurring delivery and succeeding events about the service population.
- The screen shot was updated on the Identify Program screen showing the new funding source fields, along with added instructions.
- A note was added to the login page on choosing different planning years.
- Updated screen shots for single service and identify recurring services for the new objective field.

Changes for April 27, 2007

- Additional tips were added to knowledge base and support section of the manual.

Changes for March 28, 2007

- An additional tip was added to the Identify Groups section regarding Inactive Status.

Changes for March 16, 2007

- The screen shot was updated for the Support Site page.
- Instructions for the Evaluation module have been added.
- Additional instructions/screen shots have been added to the following sections in relation to the Evaluation module: Problem Statements, Goals and Objectives.
- An additional tip was added to the Standard Reports section.

Changes for March 2, 2007

- Additional information regarding HIPAA has been added to the description of Identify Participants.

Changes for January 30, 2007

- The note under “Service Population” within Single and Recurring Service panels has been updated due to the “Check All” feature being removed.
- New fields were added to the Service Review module to allow counties to release service by provider and date.
- A note was added to the Printing or Saving Reports page stating that Excel/PDF buttons were added to the Reports module to allow MAC users to view reports and for quick export of the Service Review report.

Changes for January 11, 2007

- Additional instructions were added to the Coalition/Partnership & Staff Meetings “Add Agenda/Tasks” sections.
- The instructions were modified slightly for the Change the Status of a Training page.
- The screen shot was updated for the Upload Strategic Plan page.
- Editing and deleting instructions were added for the Strategic Plan.
- The screen shot and instructions were modified for the Single Service Activity page.
- An additional tip was added to the Demographics Services page.
- The instructions were modified slightly for the Service Review page.
- The screen shot was updated for the View Service Review Report Details section.
- A tip was added to the Opening a Report section.
- The instructions were updated for the Printing or Saving Reports section.
- An additional tip was added to the Data Export page.
- A screen shot was updated for the Events Manager page.
- Additional instructions have been added to the Support Site page.

Changes for November 1, 2006

- When adding an Evidenced-Based Program, a Description field has been added and you are now able to edit the Program Name.

Changes for October 9, 2006

- The Live URL (web address) was updated on the Recommended Computer Settings page and the Login page.
- Instructions for all screens that used a selector box (i.e., Subcommittee, Meetings, Identify Groups, and Identify Participants) have been updated.
- A tip was added to the Organization page informing users that when logging in the Primary Contact will be required if one has not been selected yet.
- Instructions for duration fields have been updated on the following pages: Report Single Service Activity, Report Recurring Service Activity, Track Staff Time, and Administrative Time.
- The Reports page has had more detailed instructions added regarding additional information needed before opening a report and printing and saving a report.

CalOMS PREVENTION

USER MANUAL

VERSION 2.4
June 2013

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INTRODUCTION

CalOMS Prevention will support the goals of DHCS (Department of Health Care Services) to develop and implement processes, practices, standards and tools that will enable collection of meaningful outcomes measures from all DHCS funded alcohol and other drug prevention programs in California.

CalOMS Prevention will also satisfy the federal Strategic Prevention Framework (SPF) model for prevention data collection requirements as it is finalized by the Substance Abuse and Mental Health Services Administration. The SPF uses a five step model which includes Assessment, Capacity, Planning, Implementation and Evaluation. During the Assessment and Planning phases, problem statements, goals and objectives are created and providers are assigned to specific objectives. During the Implementation phase, the services, activities and community/environmental prevention initiatives aimed at accomplishing the goals and objectives are tracked. Lastly, the progress of the goals and the outcomes of the programs are evaluated.

In addition to satisfying federal reporting needs, the information collected via CalOMS Prevention can strategically be used by counties to enhance their prevention efforts.

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TIPS FOR USING THE SERVICE EFFECTIVELY

Recommended Computer Settings

Screen Resolution

You will get the best screen layout if you set your PC monitor settings to 1024 x 768 pixels or larger. If your screen resolution is smaller (ex. 800 X 600 pixels), everything on the screen will appear larger. But, if you use 800 X 600 pixels, then you will have to scroll more both up & down and left & right to access all the data fields.

Pop-Up Blockers

Modern computer security technology and usability features development have led to pop-up blocking. Although this new feature of Internet browsers, toolbars and other 3rd party managing software blocks hazardous and annoying pop-ups, sites like CalOMS Prevention require pop-ups to be able to function. If your pop-up blocker is enabled, then there is a possibility that CalOMS Prevention may not function or appear properly. You should either disable the pop-up blocker while using CalOMS Prevention (while remembering to enable it, if desired, when not using CalOMS Prevention) or create exceptions for the pop-up blocker. Although enabling and disabling the pop-up blocker may be cumbersome, it may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your internet browser window. If using Internet Explorer, click the top toolbar option "Tools" and then go to "Internet Options". After the Internet Options window is available, you will want to click on the "Privacy" tab at the top of the window. You will notice while on the "Privacy" tab, at the bottom will be a section on Pop-Up Blockers. If your "Block pop-ups" checkbox is checked, then click on the "Settings" button to allow for exceptions. If using Mozilla Firefox, click the top toolbar option "Tools" and then go to "Options". After the Options window is available, you will want to click on the "Content" tab at the top of the window. If your "Block Popup Windows" is checked, click the "Allowed Sites" button to the right to allow for exceptions.

You can now add the CalOMS Prevention links to the "Allowed Sites" list which the pop-up blocker will ignore when trying to block pop-ups from CalOMS Prevention. You will want to add "https://caprev.kithost.net" for the live system, and "http://demo.kithost.net" for the demo system. Once these sites are added to your "Allowed Sites" list, the pop-up blocker will no longer prevent pages from loading or appearing while you are using CalOMS Prevention.

*Note: These are instructions for Internet Explorer 7.0 and may be different for other Internet Explorer versions.

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System Navigating

The APPLICATION is set up in such a fashion that moving from Left to Right on the menu is the best approach to using the application. Start at Assessment, filling in all the information for that area before moving on to the Planning section. Continuing in this manner will ensure that all of the sections of the application have enough information to function correctly. If all of the different portions are not completed, some modules will not work correctly.

Computer Keys

While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

Key	Description	Function
	The Cursor	Points to desired location
	The TAB key	Moves the cursor to the next data field
	Hold down the SHIFT key and then press the TAB key	Moves the cursor to the previous data field
	The Control (Ctrl) key	Enables blocked material to open (due to pop-up blocker)
	Use the MOUSE by pointing and clicking to move the cursor	Moves the cursor by pointing and clicking

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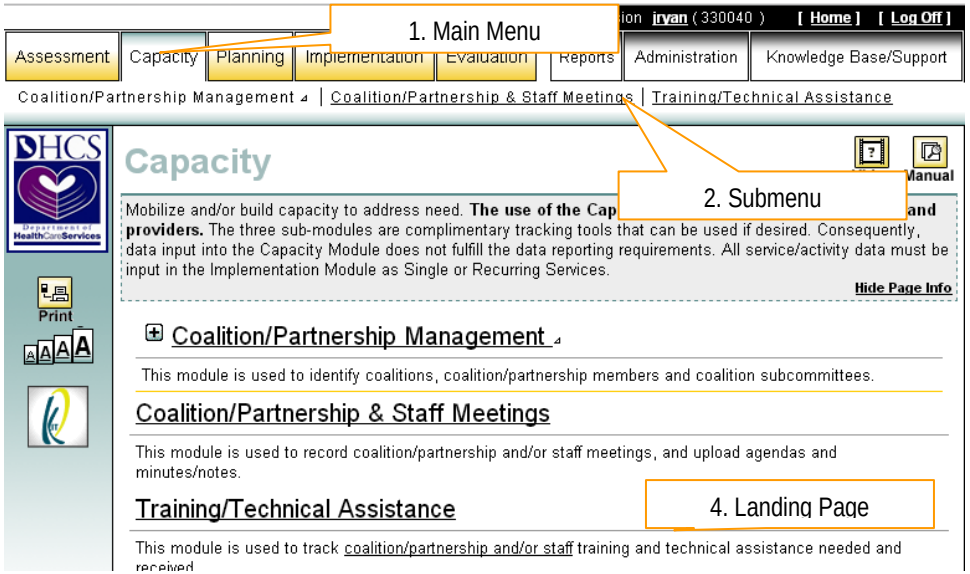
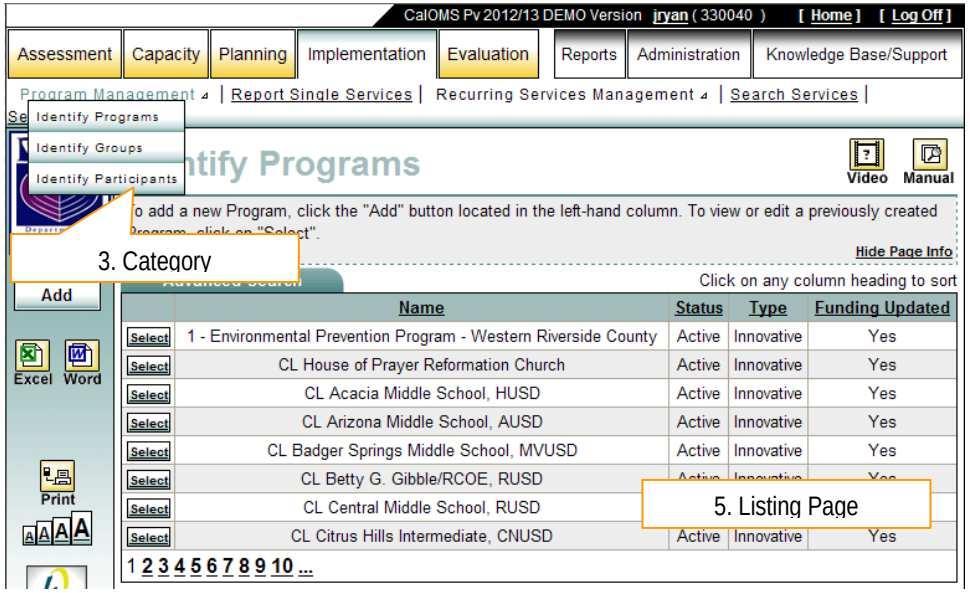
Menu Information

The menu for the service is located across the top of the screen. Each Main Menu category is broken down into Submenu categories to choose from and some Submenu categories may have a Category list to choose from (see Submenu category, Capacity Management, for an example).

1. Main Menu — Constant (unchanging)
2. Submenu — Vary depending on which Menu item is selected.
3. Category — Vary depending on which Submenu item is selected.
4. Landing Page — Varies depending on which Main Menu category is selected. Displays the Submenu Categories.
5. Listing Page — Varies depending on which Submenu Category is selected.



(This is a screenshot displaying a Landing Page.)



(This is a screenshot displaying a Listing Page.)

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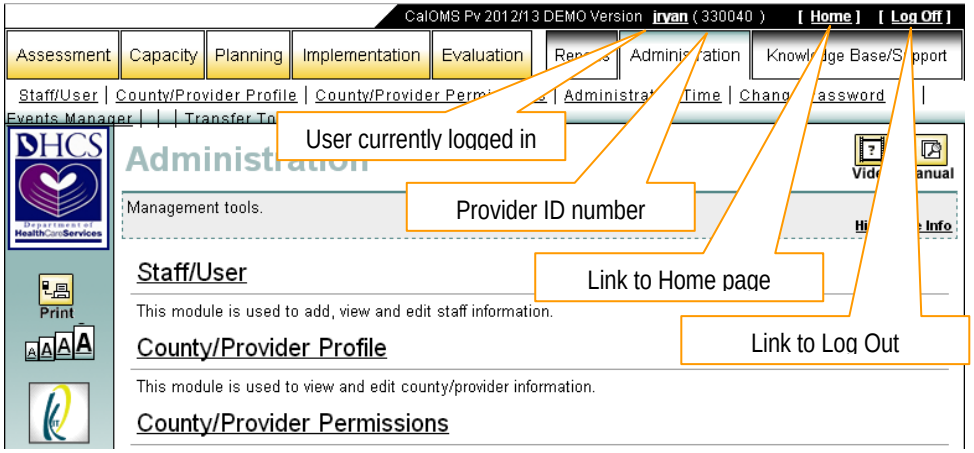
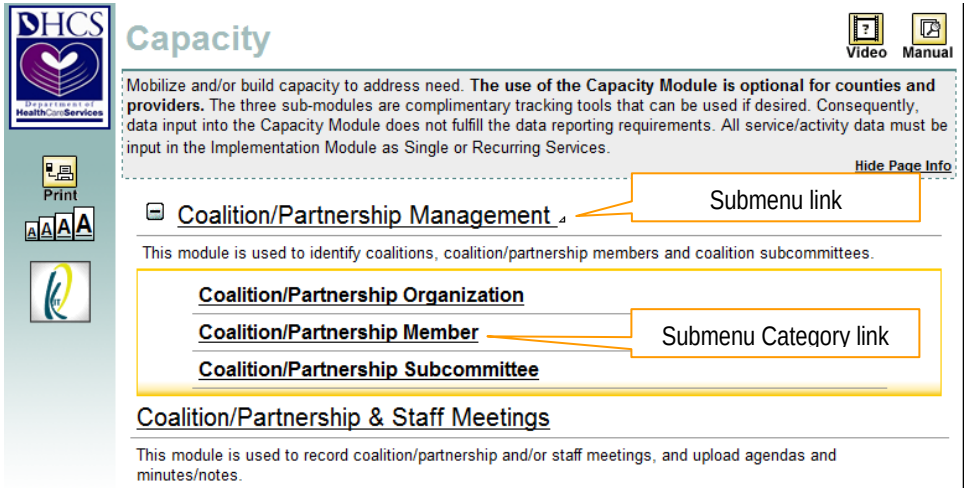
The top of the menu provides links to the Home (Home) page and to Logout (Log Out) of the Service. The **Provider ID number** is listed as well as the user currently logged into the KIT Prevention Service.



Landing Pages

When first entering a module you may see a list of the entire categories associated with that module. This is called a "Landing Page". The Landing Page of a module provides a description of what can be done in that module as well as listing each category as a link to the Listing Page and entry forms. (For more information on the Listing Pages, see the Listing Pages section.) No data is entered on the Landing Page.



(This is a screenshot displaying a Landing Page.)

To open a category:

- Click on the Landing Page Submenu Category link.

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Listing Pages

After selecting a category from the Landing Page you will see the “Listing Page”. When going into an area where a Listing Page is available, the service allows you to select previously entered data to edit or view its content. No data is entered on the Listing Page.

- When viewing a Listing Page, all of the data is available for Searching. (See the Advanced Search section for more details on searching.)

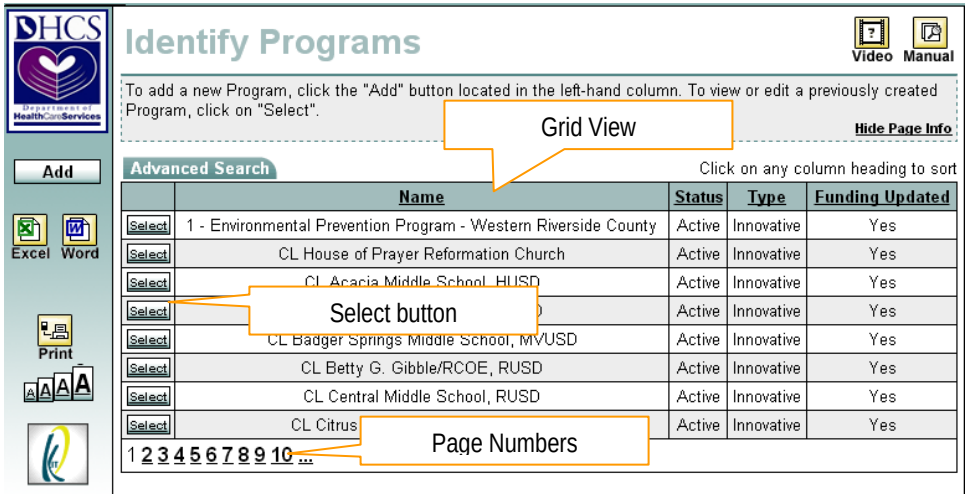
There are two types of Listing Pages:

1. Grid View
2. Hierarchy View
3. Single Form View

Grid View:

The Grid View displays the data in tables. Specific pieces of data will be displayed within the Grid based on the fields within the entry/edit form.

- When first viewing a Listing Page, all of the data is available for Searching. Click the Select (Select) link to the left of the data you would like to edit/view.
- You will be taken to the entry/edit screen. This page will be in edit mode (all data fields will be open for data entry). Make any changes needed to the form. Click the Save (Save) button to save the changes.



(This is a sample screenshot displaying a “Grid View” Listing Page.)

Tips

- By default, the grid will display up to ten records per page. To move between the various pages, use the numbers at the bottom of the grid. If there are less than ten records listed, the buttons will not be active. 1 2 3 4

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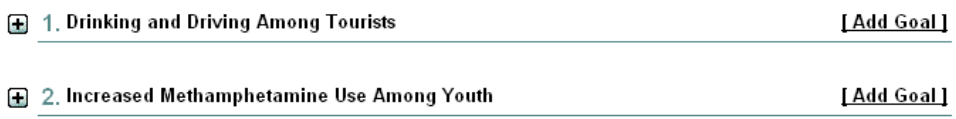
• Hide Page Info	Allows the information to be hidden from view
• Show Page Info	Places the Page Information back in view

Hierarchy View

A Hierarchical View is used when there is a 'Parent/Child' relationship. Looking at the example, Ex 1 shows the parent (the Problem Statement that was created in the Assessment module) whereas Ex 1.1 is the child (the Goal that will be created in the Planning module.) The need to link a child (goal) to a parent (problem statement) adds complexity to the process of adding and searching. The hierarchical view was designed to simplify these tasks.

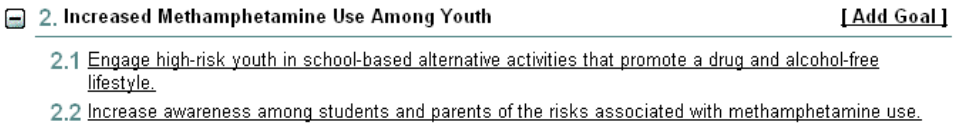
(This is a sample screenshot displaying the Hierarchy View. This is a partial screenshot.)

1. All of the "parents" will be displayed on the Listing page upon entering the module.
2. To create or add a "child", click on the link to the right of the "parent".
3. To view all of the "children" underneath a "parent", click on the ⊞.
4. The ⊞ will become a ⊟, and all of the "children" will be displayed below the "parent".



(This is a sample screenshot displaying the Hierarchy View. This is a partial screenshot.)

5. To edit or delete a "child", click on the "child" link.



(This is a sample screenshot displaying the Hierarchy View. This is a partial screenshot.)

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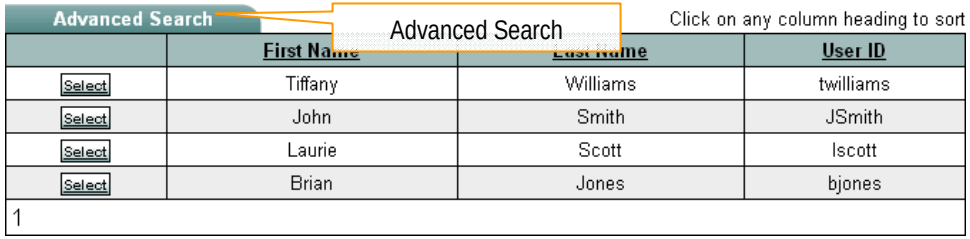
Advanced Search

Each Listing Page includes a search feature which allows you to find a particular record by clicking the Advanced Search (Advanced Search) tab and selecting several variables. In addition, records are able to be sorted in ascending or descending order by clicking on the column name (e.g., First Name) at the top of the table.



(This is a sample screenshot displaying the Advanced Search tab on a Grid View Listing page.)

To begin using the Advanced Search feature:

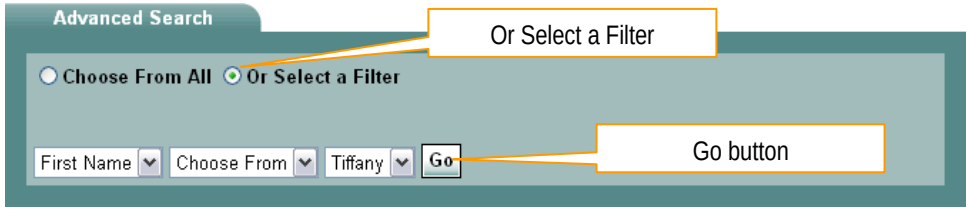
1. Click the Advanced Search (Advanced Search).

There are two ways to use the search feature: 1) Choose From All or 2) Or Select a Filter.

2. Select the Choose From All (Choose From All) radio button to see a list of all of the data saved.

(This is a screenshot displaying the Advanced Search feature.)

3. The Or Select a Filter (Or Select a Filter) radio button allows you to limit search results. To change the search filters, first click the Or Select a Filter (Or Select a Filter) button. Then, click on the black arrow at the right-hand side of the dropdown fields and select an option. Once the three filters have been selected, click the Go (Go) button to see the search results.



(This is a screenshot displaying the Advanced Search feature.)

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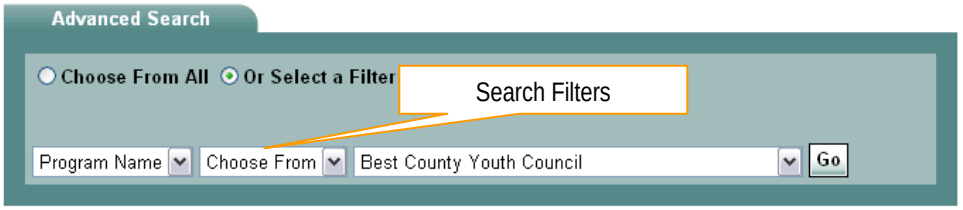
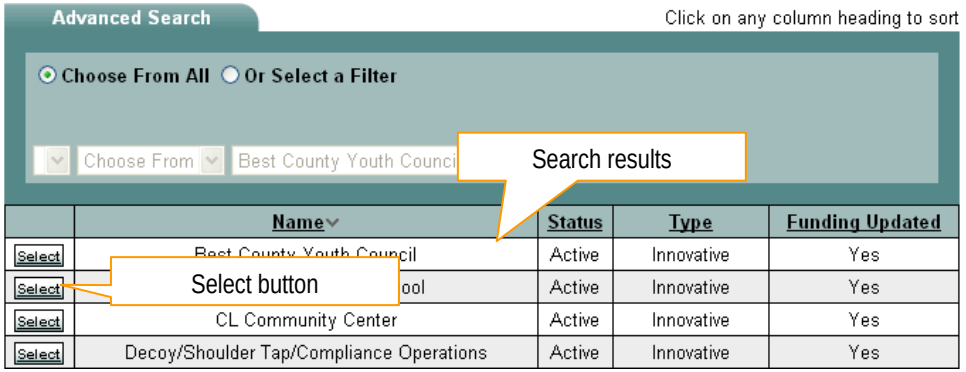
4. The three search filters are used in the following method:
    a. The first search filter will display the search categories to select from.
    b. The second search filter allows you to select how you would like to filter the search results.
    c. The third search filter is the search criteria (i.e, 10/23/08 as a date of service).



(This is a sample screenshot displaying the Advanced Search feature.)

5. Once you have clicked the Choose From All (Choose From All) radio button or used the Or Select a Filter (Or Select a Filter) option, you will see a list of data. Click the Select (Select) button next to the line of data that represents the data to be viewed or edited.
6. After you click the Select (Select) button you will be taken to the Edit Form. This page will be in Edit mode. Make any changes needed to the form, if applicable. Click the Save (Save) button to save those changes.



(This is a sample screenshot displaying the Advanced Search results.)

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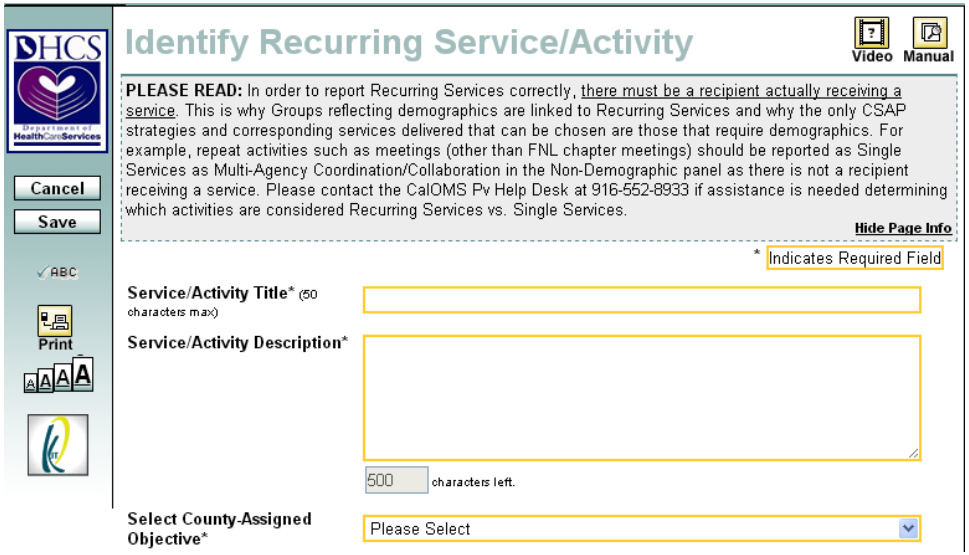
Edit Forms

The Edit Form contains the fields for entering and editing data. The buttons for saving, canceling, deleting, printing, and in some cases, adding and editing, are available at the top right of the page. (See the Data Fields and Button section for additional details on the function of these buttons.)

- If you clicked the Add (Add) button to enter new information into a form, the Edit Form data fields will be blank.
- When selecting the Select (Select) button to view existing data, the Edit form data fields will display the data entered/selected previously. These fields may be modified, if needed.



(This is a screenshot displaying a blank Edit Form. This is a partial screenshot.)

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Data Fields and Buttons

In CalOMS Prevention there are several fields, boxes and buttons that are used to collect and store data.

Type	Preview / Description
Text Field (aka 'Text Box)	(fill in the blank)
Drop Down Menu (aka Pull Down Menu)	(select one)
Buttons	Add Remove Add > < Remove Add Remove
Radio Button	Selected Not selected
Check Boxes	Selected Not Selected
First Name*	A yellow field and an asterisk denotes a required field
	Denotes a Note with more information regarding the field.
ABC	Spell Check
!	Indicated that a required field was missed at the time of saving.
4000	Character Limit Display

It does not matter the order in which the above fields are filled in, but if a required field is not filled in and you try to save the form, you will receive a message informing you what field is missing data, and you will not be able to save the form until that field has data.

Tips

- All the fields with an asterisk (*) are required fields. These must have a value entered before the record can be saved.
- You can type an identifying letter of an item in a dropdown list and the first selection beginning with that letter will appear in the box.

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Edit Form Buttons

Information is entered and edited on the computer screen through data entry/edit forms. The table below summarizes the buttons used to enter/edit information.

Add	Must be pressed first to add new information to a form
Save	Adds the information on the form to CalOMS Prevention.
Delete	Removes the information currently on the form from CalOMS Prevention
Cancel	Cancels the Add or Edit without saving any information entered.
	Allows you to change the text size by clicking on one of the different sized A's.

Additional Feature Buttons

Each page within the APPLICATION offers additional help to the user. Click on one of the icons to receive the help needed.

	Opens an Excel spreadsheet displaying the information on the Listing page.
	Opens a Word document displaying the information on the Listing page.
	Prints the information currently on the form
	Provides the multimedia tutorial video specific to the submenu topic.
	Provides user manual help specific to the submenu topic. Includes step by step instructions for adding, editing and deleting.
	Provides information on this topic with regards to prevention.

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Using the Text Resizer

You can alter the size of the text with the Text Resizer . Clicking on one of the s changes the text size from smallest to largest. Place the mouse pointer over one of the s and left click to change the size.

Provides the smallest text size.

Provides the default text size.

Provides a medium text size.

Provides the largest text size.

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LOGIN PROCEDURE

Connect to the Internet using the Internet browser. In the Address (Location) box, type in the following address and press enter:

Live Data:
https://caprev.kithost.net/calomspv

Training Data:
http://train.kithost.net/calomspv

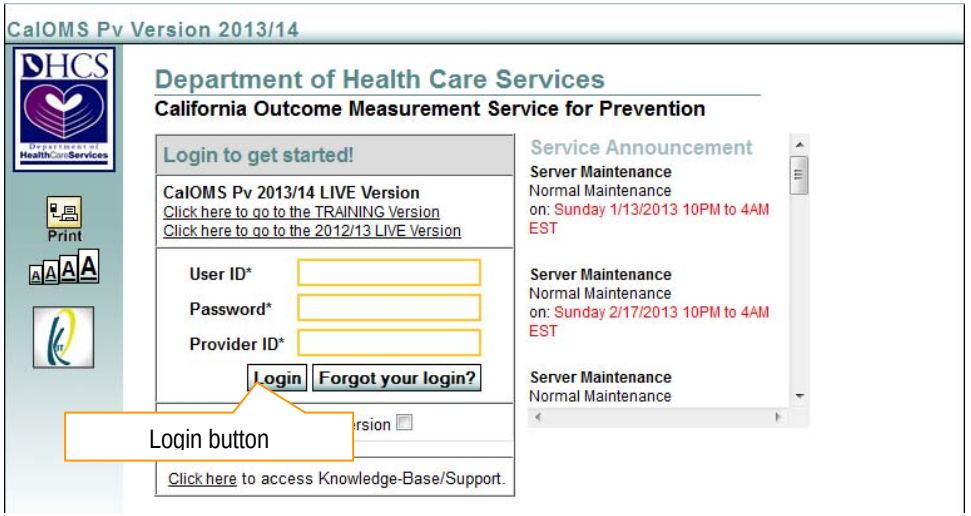
The following screen will appear:

Logging into CalOMS Prevention.

Type in the **User ID**, **Password**, and **Provider ID** supplied to you by your administrator and click the **Login** button.
*Note: Before logging in you will be able to choose which planning year you would like to work in.

Tips

- The User IDs are NOT case sensitive.
- Passwords ARE case sensitive.



(This is a screenshot displaying the Login Page.)

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Forgot Your Login?

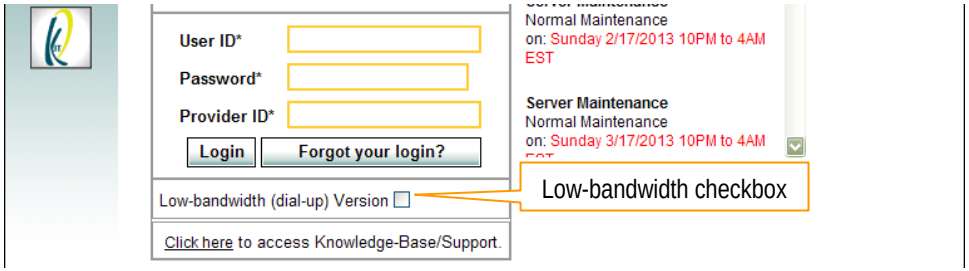
If you are unable to log into CalOMS Prevention due to forgetting your UserID or Password, you can retrieve this information by clicking the Forgot your login? button

Click the Request button. You will receive a reply with your login information as long as the e-mail address entered matches the address provided in the Staff/User module.

(This is a screenshot displaying the Forgot your Login Screen.)

Low-bandwidth (dial-up) Version

By clicking this box, CalOMS Prevention will remove all pictures, allowing the system to load more quickly.



(This is a screenshot displaying the Login Page.)

Tips

- If the staff/user has a hyphen or a space in the last name, the User ID will include the hyphenation or space. For example: Tiffany Williams-Pitt would have the User ID of twilliams-pitt. Georgia Von Helsing would have the User ID of gvon helsing.

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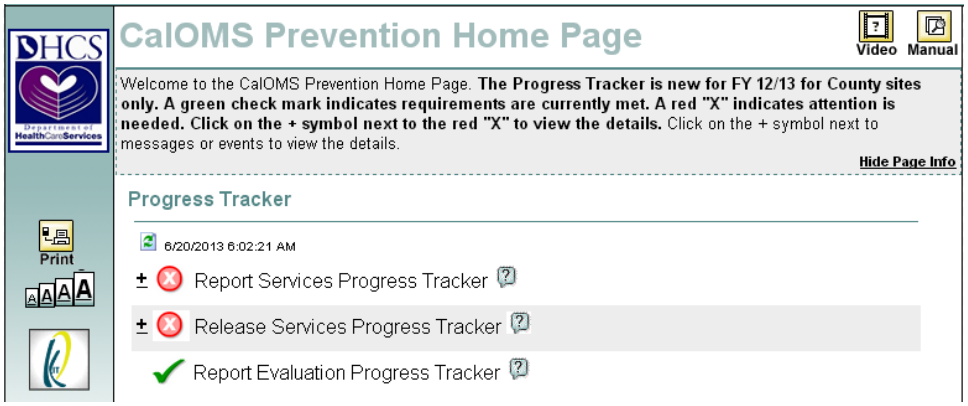
HOME PAGE

The Home Page provides the state and county/provider with a dashboard that shows a Dashboard, important Messages and upcoming Events.

Dashboard

The Dashboard (Progress Tracker) is used to track your progress.

1. To view the **Progress Tracker**, click on the ⊞ next to the Report Services Progress Tracker.
    a. The ⊞ will become a ⊟.
    b. To close the Report Services Progress Tracker, click on the ⊟.
    *Note: The dashboard/Progress Tracker will only display for the state or county level providers.

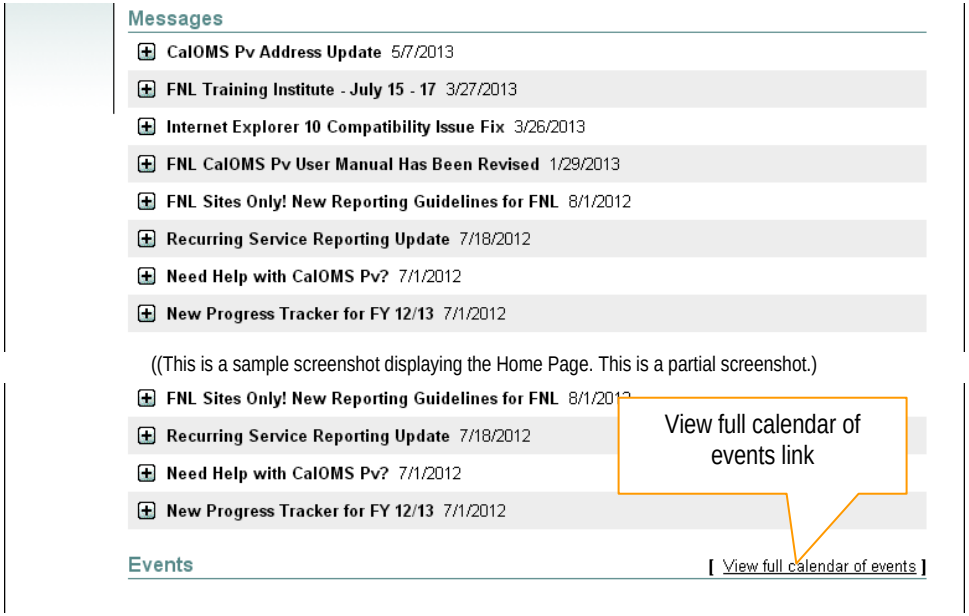


(This is a sample screenshot displaying the Home Page of a state or county level provider.)

Messages

The Message section on the Home Page displays important messages posted by DHCS.

1. To view a **Message**, click on the ⊞ next to the Message title.
    a. The ⊞ will become a ⊟.
    b. To close the message, click on the ⊟.



((This is a sample screenshot displaying the Home Page. This is a partial screenshot.)

(This is a sample screenshot displaying the Home Page.)

Events

The Events section on the Home Page displays important events.

1. To view an **Event** description, click on the ⊞ next to the Event title.
2. To see a full month's display of events, click on the link entitled View full calendar of events.
    *Note: The Events are added to the Home page from the Administration module. See Events Manager for instructions.

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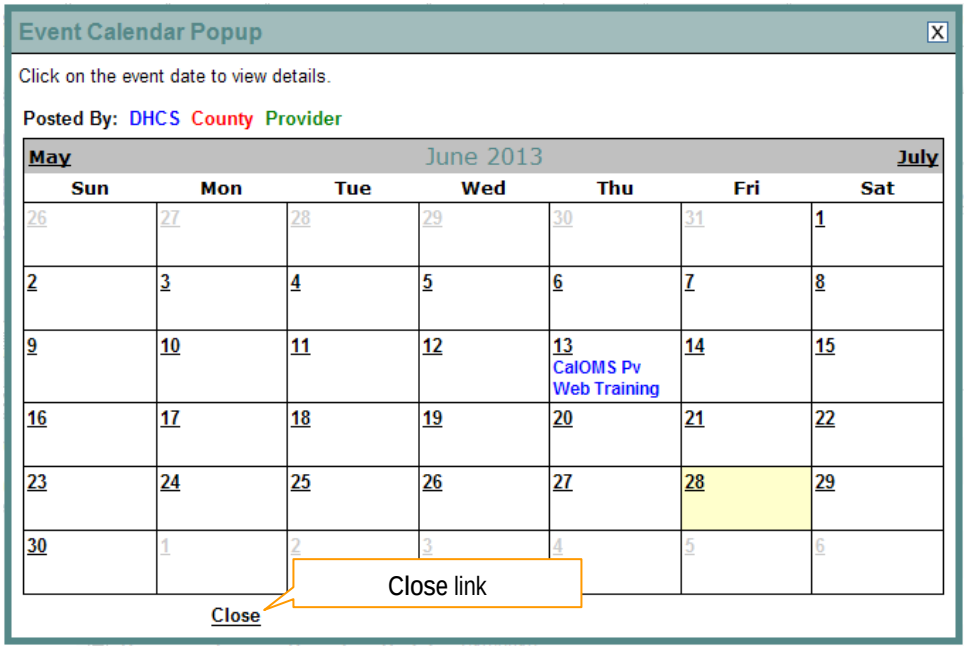
a. A new screen will appear displaying the Calendar.
b. To view the Event details for a particular day, click on the calendar date (e.g., 18
c. Switch to the previous or next month by selecting the link located to the right and left of the month's name.
d. To close the Calendar, click the ☒ (X) in the upper left hand corner or click the Close (Close) link.



(This is a sample screenshot displaying the Calendar.)

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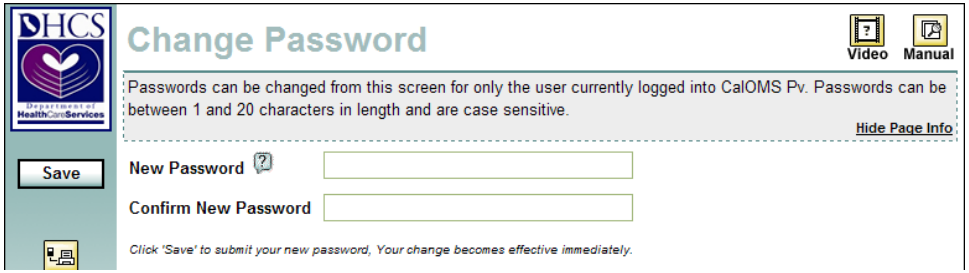
Change Password

When a county/provider accesses the service for the first time, they use a default username 'admin' with the password of 'pass'. The Change Password module allows the user to change this default password which ensures secure access to county/provider information. The Change Password module also allows the user to change the password on the account they are currently logged into.

Use the following steps to change your password:

1. Click **Administration** from the main menu.
2. Click **Change Password** from the submenu.
3. Type in the **New Password**.
4. Re-type the password in the **Confirm New Password** field.
5. Click **Save** from the left toolbar to save the changes.



(This is a screenshot displaying the Change Password Page.)

Tips

- It is important to remember that passwords are case sensitive.
- Passwords can be any combination of letters, numbers and/or characters.
- Passwords do not expire; however, it is a good idea to change your password every 3 months for security purposes.

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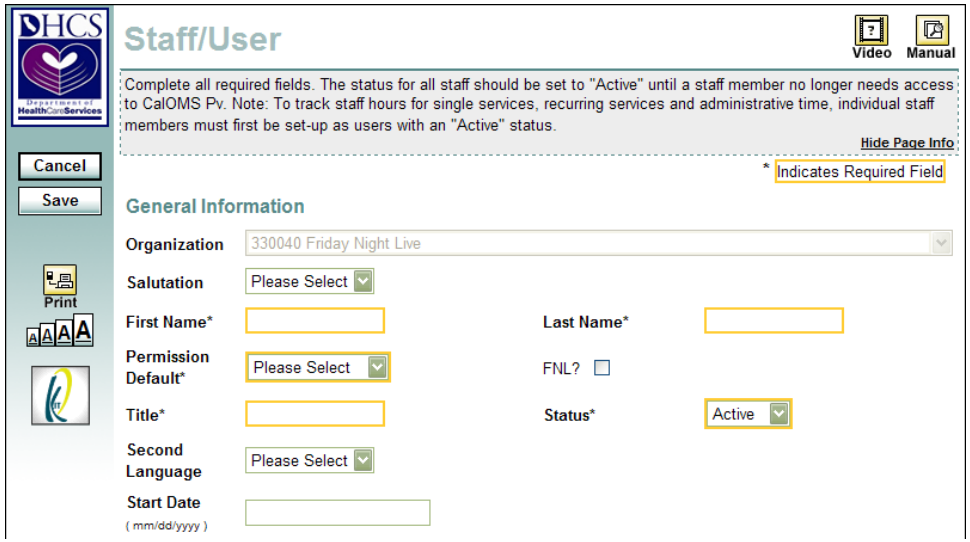
Staff/User

The Staff/User module enables counties and providers to track staff members' hours. In order to track staff hours as they relate to specific services/activities, the staff members must be set-up in this module prior to entering service/activity data.

A staff member MUST be set-up if:

1. He/she will need access to CalOMS Prevention for data entry.
2. The county/provider wants to track staff time.

1. Click **Administration** from the main menu.
2. Click **Staff/User** from the submenu.
3. Click **Add** from the left toolbar.
4. If desired, select a **Salutation** from the dropdown list.
5. Type in the staff member's **First*** and **Last Name***.
6. Select the **Permission Default***.
    a. *Admin* permissions should be given to staff members that are acting as the primary contact for CalOMS Prevention.
    b. *Staff-User* permissions should be given to staff members that log onto CalOMS Prevention and enter data.
    c. *Staff-Read Only* permissions should be given to staff members that provide prevention services but may not do data entry.
    d. *Custom* permissions should be given to staff members that require a set of permissions that do not fit the above defaults (Admin, Staff-User or Staff-Read Only). Select the **Permissions** link located to the right of the **Permission Default** dropdown list to set the custom permissions.
7. Type in the staff member's **Title***.
8. The **Status*** will default to *Active*.



(This is a sample screenshot displaying the Staff/User Edit Page.)

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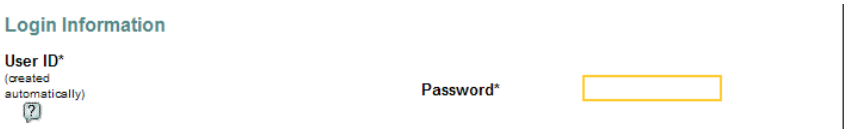
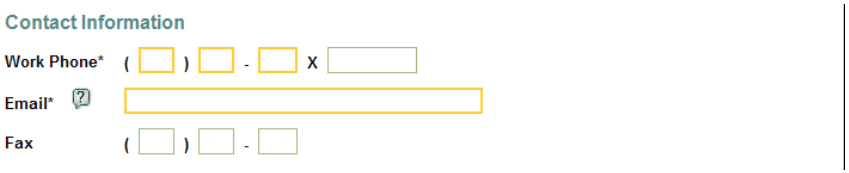
9. Enter the staff member's Login Information.
    a. The User ID* will be the login name used by the staff member. This is automatically created after saving. The User ID is always the first letter of the user's first name and the full last name with no spaces in between.
    b. The Password* field is where a temporary password is created for the staff member and can be any combination of alpha or numeric characters. This password will be used along with the User ID and six (6) digit county/provider identification number to log into CalOMS Prevention. Once a user logs in, they can use the Change Password area to change the password to one of their liking.



(This is a screenshot displaying the Staff/User Edit Page.)

10. Enter in the staff member's Work Phone* and Email* address.
11. If desired, enter in the Demographic and Education Information.
12. Once all information has been entered, click Save. If you do not want to save any changes, click Cancel.



(This is a screenshot displaying the Staff/User Edit Page.)

Tips

- FNL users must click the FNL? checkbox FNL? ☐ to have access to FNL data.
- If there is no Email for the staff member, type "none" or "n/a" in the blank field. However, without an email address, the user will not be able to use the automated "Forgot your login?" procedure located on the login page. The user will have to contact their administrator directly.
- Passwords can be any combination of letters, numbers and/or characters.
- Passwords are case sensitive.
- If the staff/user has a hyphen or a space in the last name, the User ID will include the hyphenation or space. For example: Tiffany Williams-Pitt would have the User ID of twilliams-pitt. Georgia Von Helsing would have the User ID of gvon helsing.

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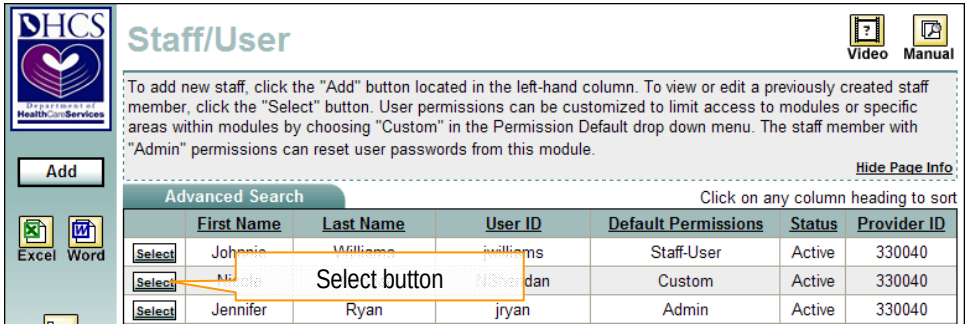
Custom Permissions

No Permission	No access to a particular module
Read Only	Staff can only view information
Read and Write	Staff can add new information, view and edit existing information
Full Control	Staff can add new information, view, edit, and delete existing information

Editing Staff Accounts

1. Click **Administration** from the main menu.
2. Click **Staff/User** from the submenu.
3. From the Listing page, select the staff member that you wish to edit by clicking the Select button.
4. The staff member will appear in the edit mode.
5. Make any changes needed to the form.
    a. **Status** (see Tips)
        i. *Active*: currently on the staff of the county/provider.
        ii. *Inactive*: no longer on the staff of the county/provider.
6. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Staff/User Listing Page. This is a partial screenshot.)

Tips

- The **Status** is used to keep a staff member in CalOMS Prevention for history purposes. When a staff member leaves, you will not be able to delete the staff member if they reported services, but you can make them *Inactive* to remove their name from forms and prevent the staff member from entering any further data into CalOMS Prevention.

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Deleting Staff Accounts

1. Click **Administration** from the main menu.
2. Click **Staff** from the submenu.
3. From the Listing page, select the staff member that you wish to delete by clicking the Select button.
4. The staff member will appear in the edit mode.
5. Click **Delete** from the left toolbar.
6. Click **OK** when asked “Are you sure?”. If you do not want to delete this staff member, click **Cancel**.

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County/Provider Profile

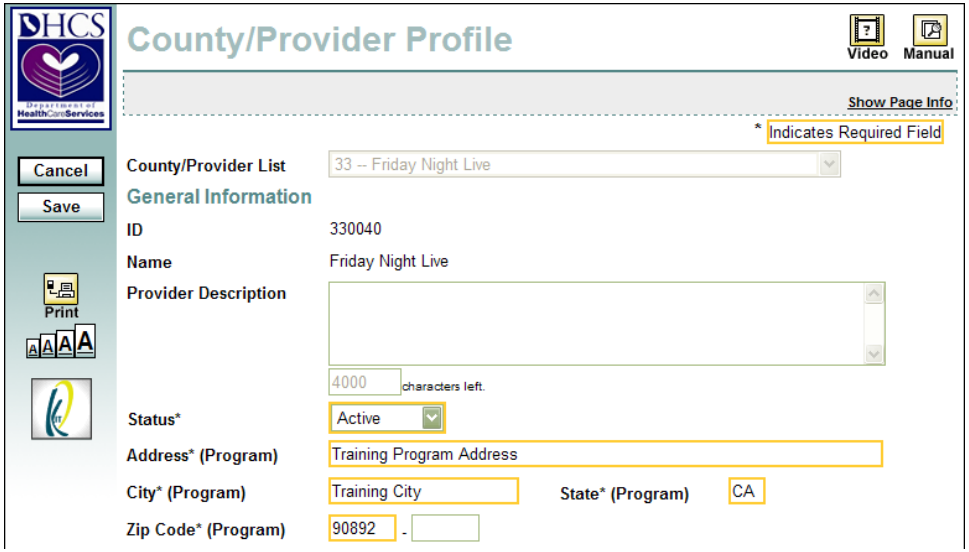
The Provider ID used to sign into CalOMS Prevention is associated with the county/provider for whom you work. The Provider ID was created by the Department of Alcohol and Drug Programs and the contact information may need to be updated. Please review for accuracy.

Viewing the County/Provider Profile

1. Click **Administration** from the main menu.
2. Click **County/Provider Profile** from the submenu.

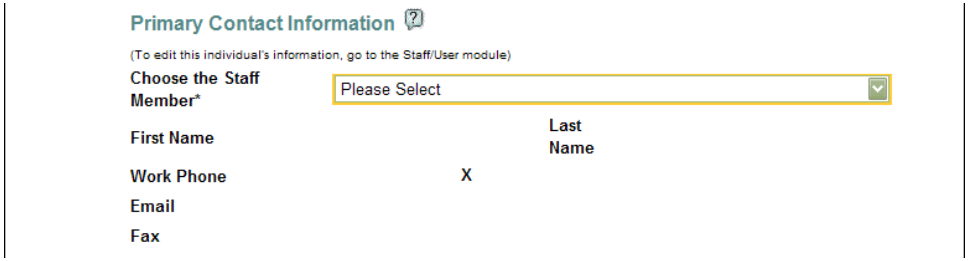
Editing the County/Provider Profile

1. Click **Edit** from the left toolbar.
2. Make any changes needed to the General Information.



(This is a sample screenshot displaying the County/Provider Profile Edit Page.)

3. In the Primary Contact Information section, select one of the staff members to serve as a contact person for CalOMS Prevention from the **Choose the Staff Member*** dropdown list. The rest of the information will be loaded for you based on what was entered in the Staff/User module.
4. You may also enter Secondary Contact Information if needed/desired.
5. If there are additional contacts for the organization, you may enter up to 2 (two) contacts in the Additional Contacts Information fields.
6. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a screenshot displaying the County/Provider Profile Edit Page.)

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Tips

- Your county/provider information is preloaded into CalOMS Prevention. If the county or provider Name is incorrect, submit a request through the online support system (click Support on the menu) and request to have it changed. Please provide the correct name.
- DHCS will automatically be notified of any changes made to the address fields. It is not necessary for you to contact DHCS to have the Master Provider file updated.
- *Program* denotes the site address, and *Admin* is the mailing address. Often these are the same.
- If a Primary Contact has not been selected, a message will appear at login informing you that a primary contact must be selected, and you will be brought to the County/Provider Profile screen after clicking the OK button in order to perform this task. Use the above steps to perform this task.

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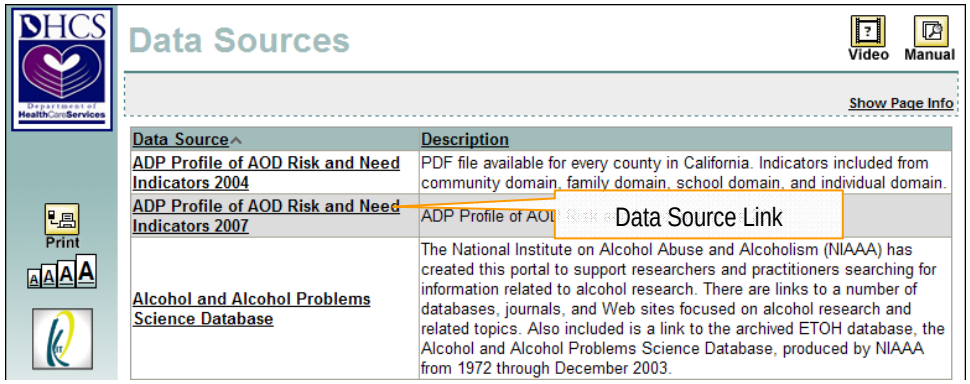
ASSESSMENT

The Assessment module provides collection, interpretation and analysis of relevant data to define the magnitude and locations of problems within a geographic area/community, and identify at risk and underserved populations and environmental risks. This module also allows counties/providers to identify the problems that need to be addressed within their community.

Data Sources

This section provides sources of secondary data to assist the user in the needs assessment process.

1. Click **Assessment** from the main menu.
2. Click **Data Sources** from the submenu.
3. Browse the *Data Source* list for the web site you would like to visit.
4. Click on the *Data Source* link to open the web site.
   *Note: The link is the *Data Source* underlined.
5. A new window will open displaying the web site you chose.
6. To close the new web site window, click on the ✕.



(This is a partial view of the Data Source page.)

Tips

- Due to the web site link opening in a new window, you may be "timed-out" of CalOMS Prevention if viewing the web site for longer than 20 minutes.

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CAPACITY

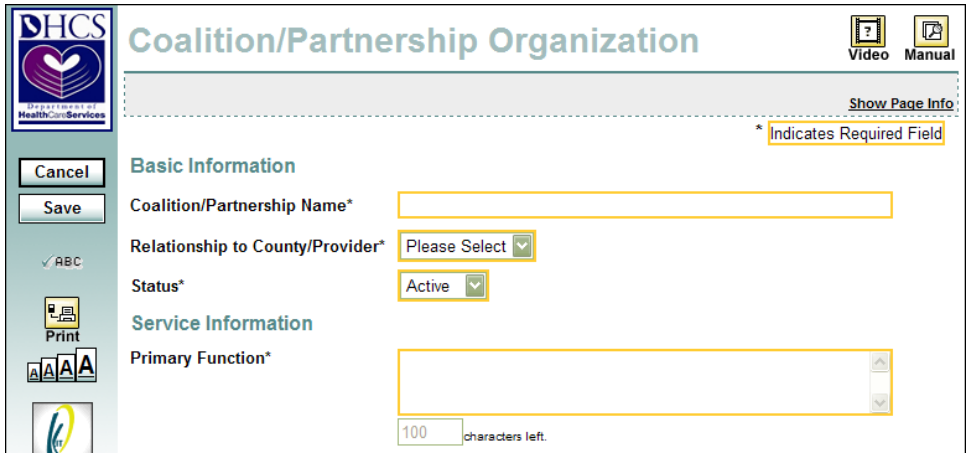
The Capacity module allows the county/provider to enter their partnerships/coalitions, keep track of coalition and/or staff meetings, and keep track of any training and/or technical assistance that is provided to the county/provider. **All modules under Capacity are optional for the county/provider.**

Coalition/Partnership Management

There are three categories under Coalition/Partnership Management. Within Coalition/Partnership Management, a county/provider is able to identify their partnerships/coalitions, the members of the coalitions, and the subcommittees of those coalitions.

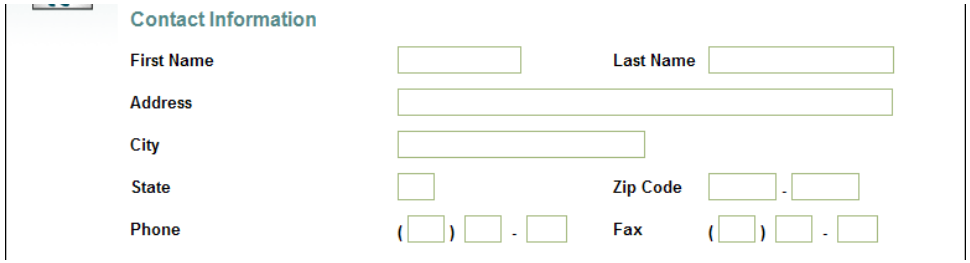
Registering a Coalition/Partnership Organization

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership Management** from the submenu.
3. Click **Coalition/Partnership Organization** from the category list.
4. Click **Add** from the left toolbar.
5. Enter the name of the coalition in the **Coalition/Partnership Name*** field.
6. Select the relationship between the coalition and county/provider in the **Relationship to County/Provider*** dropdown list.
7. The **Status*** automatically defaults to *Active*.
8. Type in the function of the coalition in the **Primary Function*** field.



(This is a screenshot displaying the Coalition/Partnership Edit Page.)

9. Enter the Contact Information for the coalition, which includes the **First** and **Last Name**, **Address**, **City**, **State**, **Zip Code**, **Phone** number, and **Fax** number.
10. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a screenshot displaying the Coalition/Partnership Edit Page.)

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Editing Coalition/Partnership Organization Information

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership Management** from the submenu.
3. Click **Coalition/Partnership Organization** from the category list.
4. From the Listing page, select the Coalition/Partnership Organization that you wish to edit by clicking the Select button.
5. The Coalition/Partnership Organization will appear in the edit mode.
6. Make any changes needed to the form.
    a. **Status**
        i. *Active*: currently a participating coalition
        ii. *Inactive*: withdrew as a participating coalition
            (1) When *Inactive* is selected, enter in the date as mm/dd/yyyy, that the coalition disbanded or withdrew, in the **Date Expired*** field.
            (2) Also, enter a reason for withdrawal, in the **Withdraw Reason*** field.
7. Click **Save**. If you do not want to save any changes, click **Cancel**.

Deleting Coalition/Partnership Organization Information

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership Management** from the submenu.
3. Click **Coalition/Partnership Organization** from the category list.
4. From the Listing page, select the Coalition/Partnership Organization that you wish to delete by clicking the Select button.
5. The Coalition/Partnership Organization will appear in the edit mode.
6. Click **Delete** from the left toolbar.
7. Click **OK** when asked "Are you sure?". If you do not want to delete this organization, click **Cancel**.

Tips

- You will not be able to delete a coalition/partnership organization if it is associated with a member or subcommittee. In these instances, mark the coalition as *Inactive*.

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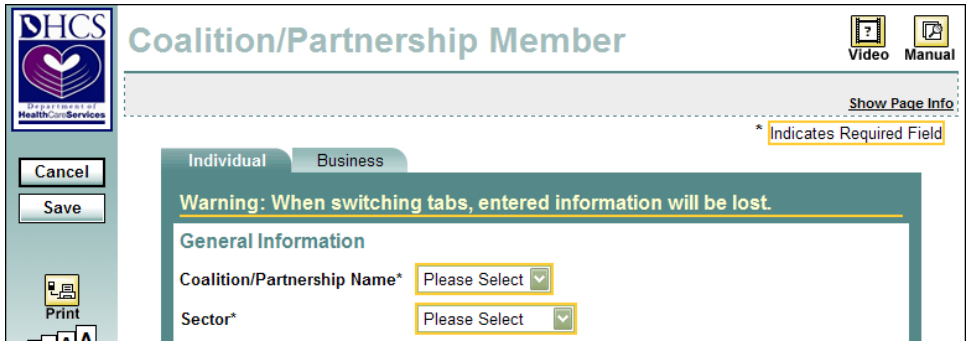
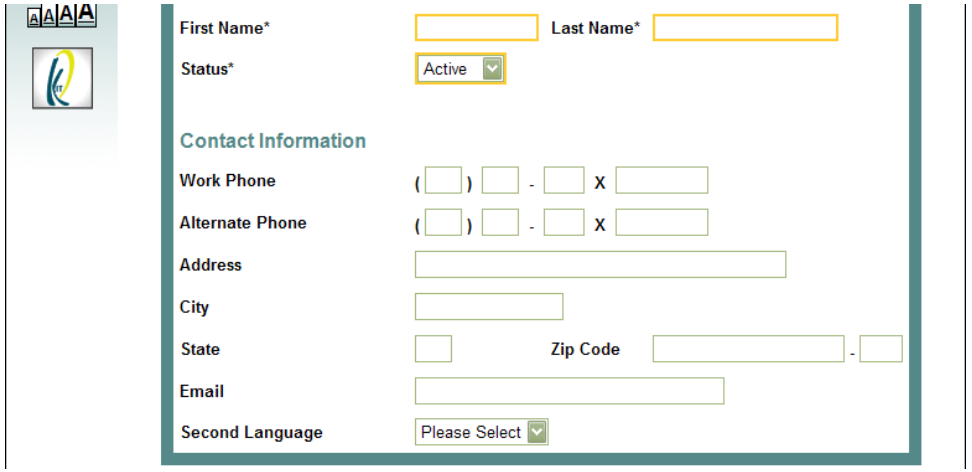
Entering a Coalition/Partnership Member

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership Management** from the submenu.
3. Click **Coalition/Partnership Member** from the category list.
4. Click **Add** from the left toolbar.
5. Select the **Coalition/Partnership Name*** from the dropdown list.
6. Select the **Sector*** from the dropdown list.
7. There are two types of members that can be entered in the Coalition/Partnership Members module, Individual or Business. Select the type of member you wish to enter.



(This is a screenshot displaying the Coalition Membership Edit Page.)

8. If the Individual tab was selected, use the following instructions:
   a. Enter the member's name into the **First*** and **Last Name*** fields.
   b. The **Status*** automatically defaults to *Active*.
   c. If desired, enter the Contact Information for the coalition, which includes the **Work** and **Alternative Phone**, **Address**, **City**, **State**, **Zip Code**, **Email** and **Second Language**.



(This is a screenshot displaying the Coalition Membership Edit Page with the Individual tab selected.)

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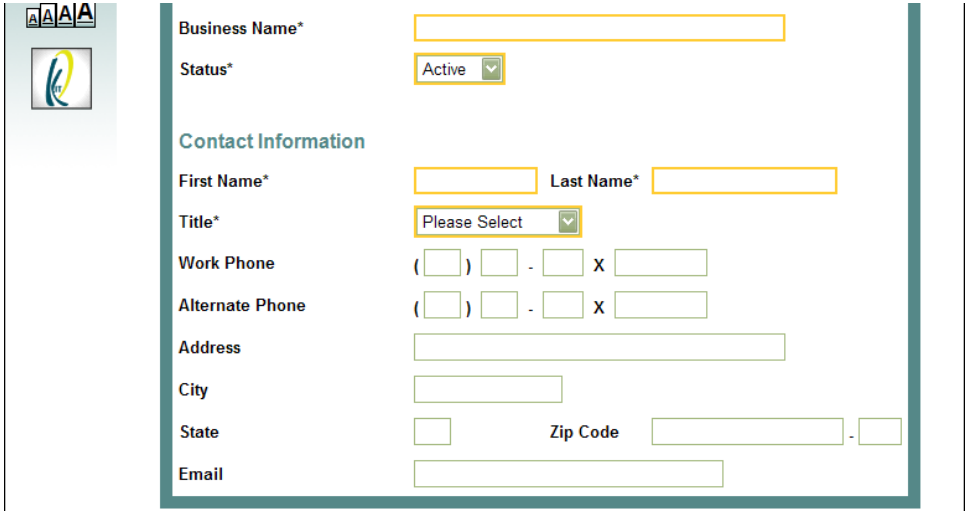
9. If the Business tab was selected, use the following instructions:
    a. Enter the member's name into the **Business Name*** field.
    b. The **Status*** automatically defaults to *Active*.
    c. Enter the member's name into the **First*** and **Last Name*** fields.
    d. Select the **Title*** of the member from the dropdown list.
    e. If desired, enter the Contact Information for the coalition, which includes the **Work** and **Alternative Phone**, **Address**, **City**, **State**, **Zip Code**, **Email** and **Second Language**.
10. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a screenshot displaying the Coalition Membership Edit Page with the Business tab selected.)

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Editing Coalition/Partnership Member

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership Management** from the submenu.
3. Click **Coalition/Partnership Member** from the category list.
4. From the Listing page, select the Coalition Member that you wish to edit by clicking the Select button.
5. The Coalition Member will appear in the edit mode.
6. Make any changes needed to the form.
    a. Status
        i. *Active*: currently a participating member
        ii. *Inactive*: no longer a participating member
7. Click **Save**. If you do not want to save any changes, click **Cancel**.

Deleting Coalition/Partnership Member

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership Management** from the submenu.
3. Click **Coalition/Partnership Member** from the category list.
4. From the Listing page, select the Coalition Member that you wish to delete by clicking the Select button.
5. The Coalition Member will appear in the edit mode.
6. Click **Delete** from the left toolbar.
7. Click **OK** when asked "Are you sure?". If you do not want to delete this item, click **Cancel**.

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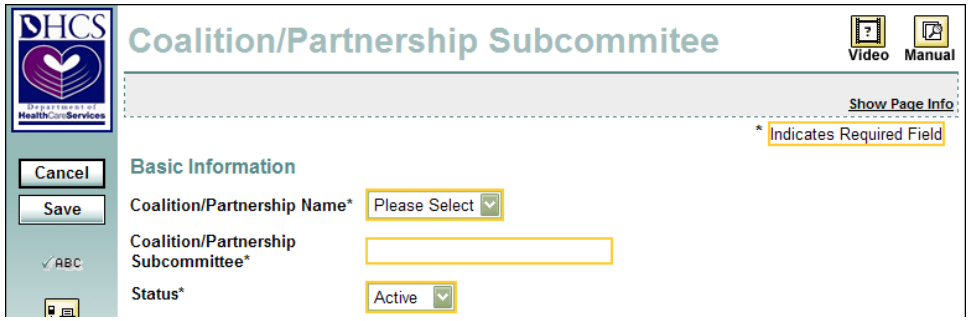
Entering a Coalition/Partnership Subcommittee

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership Management** from the submenu.
3. Click **Coalition/Partnership Subcommittee** from the category list.
4. Click **Add** from the left toolbar.
5. Select the **Coalition/Partnership Name*** from the dropdown list.
6. Enter the name of the **Coalition/Partnership Subcommittee***.
7. The **Status*** automatically defaults to *Active*.

8. Select the members to be part of the subcommittee from the Members Selection section.
    a. Select a leader of the subcommittee from the **Leader** dropdown list
    b. Click on the ⊞ next to Add Members to view all of the Coalition Members registered.
    *Note: Once the members are in view, the ⊞ becomes a ⊟
    c. Select those members that are a part of the subcommittee by checking the box next to the member's name
    *Note: If all members are to be part of the subcommittee, clicking the **Check All** selection will check all of the member names
    d. To remove a member, uncheck the member's name
9. Type in any additional information regarding this subcommittee in the **Notes** field.
10. Click **Save** to commit your changes. If you do not want to save any changes, click **Cancel**



(This is a screenshot displaying the Coalition Subcommittee Edit Page.)

(This is a sample screenshot displaying the Coalition Subcommittee Edit Page.)

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Editing Coalition/Partnership Subcommittee Information

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership Management** from the submenu.
3. Click **Coalition/Partnership Subcommittee** from the category list.
4. From the Listing page, select the Coalition Subcommittee that you wish to edit by clicking the Select button.
5. The Coalition Subcommittee will appear in the edit mode.
6. Make any changes needed to the form.
    a. Status
        i. *Active*: currently a participating subcommittee
        ii. *Inactive*: no longer a participating subcommittee
7. Click **Save**. If you do not want to save any changes, click **Cancel**.

Deleting Coalition/Partnership Subcommittee Information

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership Management** from the submenu.
3. Click **Coalition/Partnership Subcommittee** from the category list.
4. From the Listing page, select the Coalition Subcommittee that you wish to delete by clicking the Select button.
5. The Coalition Subcommittee will appear in the edit mode.
6. Click **Delete** from the left toolbar.
7. Click **OK** when asked "Are you sure?". If you do not want to delete this item, click **Cancel**.

Tips

- You will not be able to delete a coalition subcommittee if it is identified as a Coalition Meeting or Training/Technical Assistance. In these instances, mark the subcommittee as *Inactive*.

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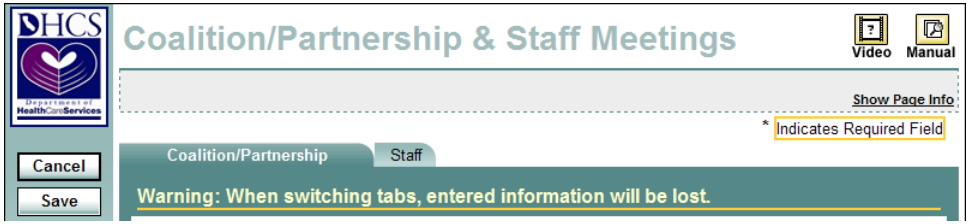
Coalition/Partnership & Staff Meetings

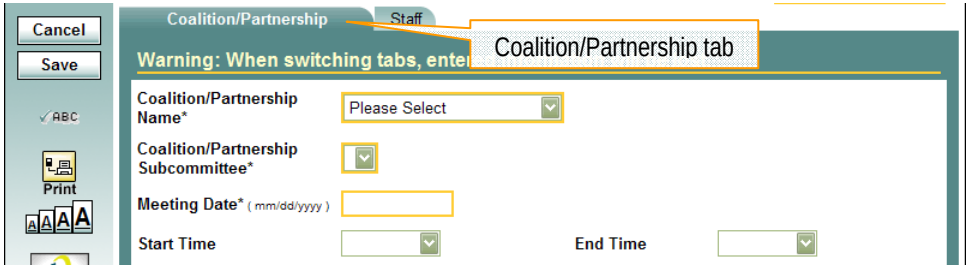
The Coalition/Partnership & Staff Meetings module allows the county/provider to record any meetings that may occur between Coalitions and/or between Staff members.

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership & Staff Meetings** from the submenu.
3. Click **Add** from the left toolbar.
4. There are two types of meetings that can be entered in the Coalition/Partnership & Staff Meetings module, **Coalition/Partnership** or **Staff**. Select the type of meeting you wish to enter.



(This is a screenshot displaying the Coalition/Partnership Edit Page.)

5. If you selected **Coalition/Partnership**, use the following instructions:
   a. Select the **Coalition/Partnership Name*** from the dropdown list.
   b. Select the **Coalition/Partnership Subcommittee*** from the dropdown list.
      *Note: Selections for this dropdown field will be available once a **Coalition/Partnership Name** has been selected.
   c. Type in the **Meeting Date***, as mm/dd/yyyy, of the coalition meeting.
   d. If desired, select the **Start** and **End Times** of the meeting.



(This is a screenshot displaying the Coalition/Partnership Edit Page.)

6. If you selected **Staff**, use the following instructions:
   a. Type in the **Meeting Date***, as mm/dd/yyyy.
   b. If desired, select the **Start** and **End Times** of the meeting.

(This is a screenshot displaying the Coalition/Partnership Edit Page.)

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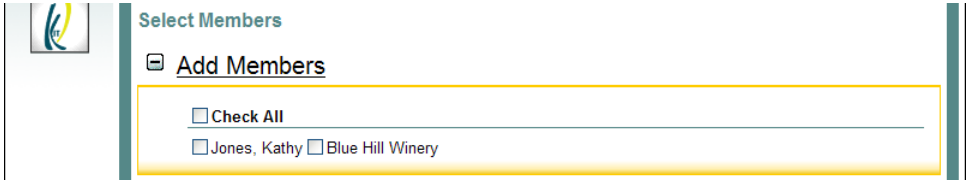
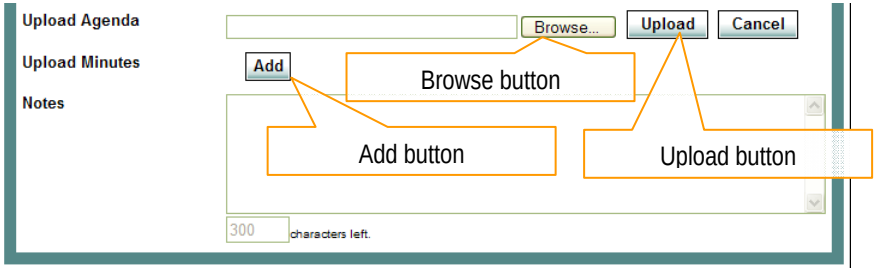
7. Select the members who attended the meeting from the Select Members section
    a. Click on the ⊞ next to Add Members to view all of the Coalition Members registered.
    *Note: Once the members are in view, the ⊞ becomes a ⊟.
    b. Select those members that attended the meeting by checking the box next to the member's name.
    *Note: If all members attended the meeting, clicking the Check All selection will check all of the member names.
        i. To remove a member, uncheck the member's name.



(This is a sample screenshot displaying the Coalition/Partnership Edit Page.)

8. You have an opportunity to insert any *agenda* or *task* documents that may be associated with this meeting.
    a. Click the Add button next to Upload Agenda or Upload Task.
    b. Click the Browse... button to search for the document you wish to insert.
    c. Click the Upload button to add the document to the meeting. Click Cancel if you do not wish to insert a document.
    d. The document will be uploaded to the service. Click on the link to open the document.
    *Note: The link will be displayed similar to agenda.pdf.
9. Type in any additional information regarding this meeting in the Notes field.
10. Click Save. If you do not want to save any changes, click Cancel.



(This is a screenshot displaying the Coalition/Partnership Edit Page.)

Tips

- When switching between the two tabs (Coalition or Staff), any data that has been entered will be lost if it is not saved prior to switching tabs.
- When entering a Coalition meeting, there is a group called General in the Coalition Subcommittee dropdown list. This is used when all members of a Coalition Organization attended the meeting.

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Editing a Coalition/Partnership & Staff Meeting

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership & Staff Meetings** from the submenu.
3. From the Listing page, select the meeting that you wish to edit by clicking the Select button.
4. The Meeting will appear in the edit mode.
5. Make any changes needed to the form.
6. Click **Save**. If you do not want to save any changes, click **Cancel**.

Deleting a Coalition/Partnership & Staff Meeting

1. Click **Capacity** from the main menu.
2. Click **Coalition/Partnership & Staff Meetings** from the submenu.
3. From the Listing page, select the meeting that you wish to delete by clicking the Select button.
4. The Meeting will appear in the edit mode.
5. Click **Delete** from the left toolbar.
6. Click **OK** when asked “Are you sure?”. If you do not want to delete this item, click **Cancel**.

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Training/Technical Assistance

The Training/Technical Assistance module allows the county/provider to keep track of needed and completed trainings that are provided to staff and/or coalition members associated with the county/provider organization.

1. Click **Capacity** from the main menu.
2. Click **Training/Technical Assistance** from the submenu.
3. Click **Add** from the left toolbar.
4. Enter in the Needed training information.
    a. Type in the date, as mm/dd/yyyy, of the training in the **Date Needed*** field.
    b. Enter in the **Subject*** of the training.
    c. The **Status*** automatically defaults to ***Pending***.
        i. ***Pending***: The training has not yet occurred.
        ii. ***Received***: The training has been completed.
        *Note: If *Received* has been selected, additional information will have to be filled out. See Changing the Status of a Training to Received for further instructions on entering in the additional information needed.
        iii. ***Cancelled***: The training has been cancelled.
    d. If desired, enter any additional information known regarding the training in the **Notes** field.
5. Click **Save**. If you do not want to save any changes, click **Cancel**

(This is a screenshot displaying the Training/Technical Assistance Edit Page.)

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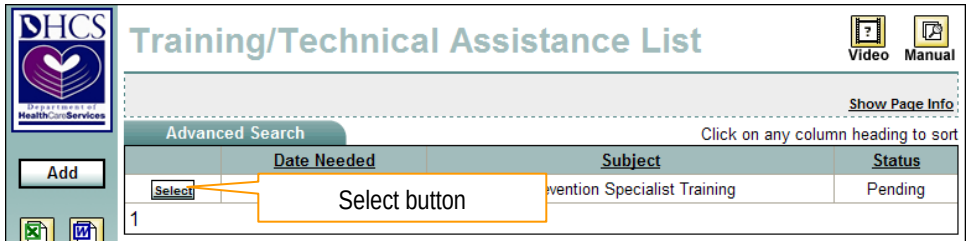
Changing the Status of a Training

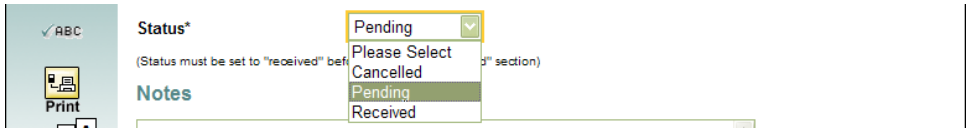
When trainings are initially created, they default to *Pending* since the training has not yet occurred. Once training is completed or cancelled, the status of the training will need to be changed. Use the following steps to change the status of your training to *Received* or *Cancelled*.

1. Click **Capacity** from the main menu.
2. Click **Training/Technical Assistance** from the submenu.
3. From the Listing page, select the training that you wish to change the status of by clicking the Select button.



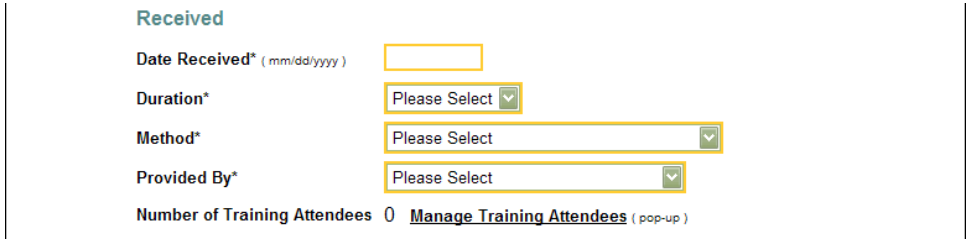
(This is a sample screenshot displaying the Training/Technical Assistance Listing Page.)

4. The training will appear in the edit mode.
5. From the **Status*** dropdown, select *Received* or *Cancelled* as the new status of the training.
6. If *Received* was selected new fields will appear on your screen.



(This is a screenshot displaying the Training/Technical Assistance Edit Page.)

a. Type in the date (mm/dd/yyyy format) the training was completed in the **Date Received*** field.
b. Select the **Duration*** from the dropdown list.
c. Select the type of training received from the **Method*** dropdown list.
d. Select who gave the training from the **Provided by:*** dropdown list.
e. Enter the name of the trainer in the **Specify*** field that appears once you've selected from the **Provided by** field.
f. If you wish to add attendees, click the Manage Training Attendees link. A new screen will appear displaying the Training Attendance screen.



(This is a screenshot displaying the Training/Technical Assistance Edit Page.)

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i. If this is a Coalition training, select the Coalition/Partnership Name* from the dropdown list.

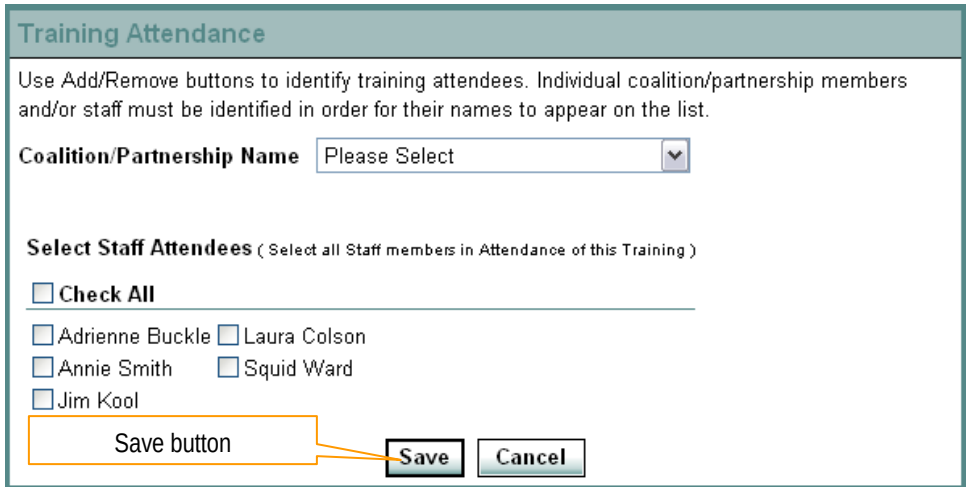
ii. Select the attendee's name from the Select Staff Attendees (or Member List if this is a Coalition training) who attended the training by checking the box next to the attendee's name.
*Note: If all (staff) members attended the training, clicking the Check All selection will check all of the (staff) member names.

a) To remove an attendee, uncheck the attendee's name.

iii. Click Save. If you do not want to save any changes, click Cancel.

iv. The Training Attendance screen will close and you are returned to the Training/Technical Assistance screen.

7. Click Save. If you do not want to save any changes, click Cancel.



(This is a sample screenshot displaying the Training Attendance Page.)

Tips

- After being returned to the Training/Technical Assistance screen upon saving your attendees, the number of attendees will be shown on the screen.

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Editing Training/Tech Assistance

1. Click **Capacity** from the main menu.
2. Click **Training/Technical Assistance** from the submenu.
3. From the Listing page, select the training that you wish to edit by clicking the Select button next to the correct training.
4. The training will appear in the edit mode.
5. Make any changes needed to the form.
6. Click **Save**. If you do not want to save any changes, click **Cancel**.

Deleting Training/Tech Assistance

1. Click **Capacity** from the main menu.
2. Click **Training/Technical Assistance** from the submenu.
3. From the Listing page, select the training that you wish to delete by clicking the Select button next to the correct training.
4. The training will appear in the edit mode.
5. Click **Delete** from the left toolbar.
6. Click **OK** when asked "Are you sure?". If you do not want to delete this item, click **Cancel**.

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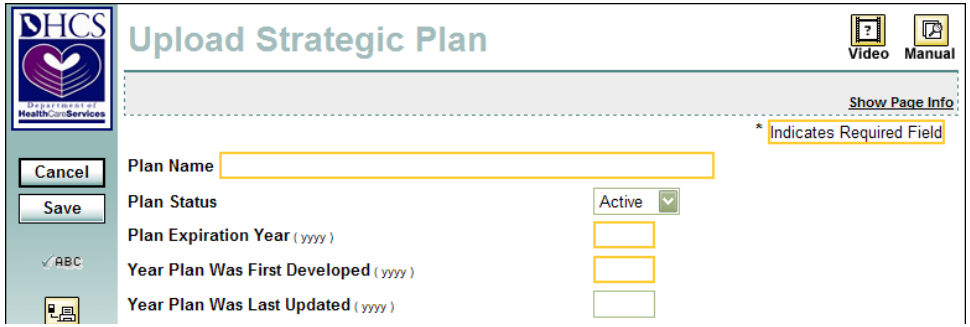
PLANNING

The Planning module allows the county/provider to upload a comprehensive strategic plan and enter their goals and objectives.

Upload Strategic Plan

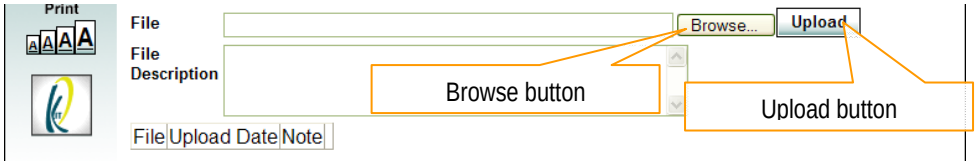
Upload an electronic copy of the strategic plan into CalOMS Prevention. Providers can only access their own plan and the county's plan. Counties can access their own plan and each of their provider's plans.

1. Click **Planning** from the main menu.
2. Click **Upload Strategic Plan** from the submenu.
3. Click **Add** from the left toolbar.
4. Enter a name for the uploaded plan to identify it by in the **Plan Name*** field.
5. The **Plan Status*** automatically defaults to ***Active***.
6. Enter the **Year Plan Was First Developed*** as yyyy.
7. Enter the **Year Plan Was Last Updated** as yyyy.



(This is a screenshot displaying the Strategic Plan Edit Page.)

8. Click the Browse... (**Browse**) button to search for the document you wish to upload.
   a. Click the **Open** button.
9. Type in any additional information regarding the plan in the **File Description** field.
10. Click the Upload (**Upload**) button to upload the file to CalOMS Prevention.
    a. A link will appear displaying the file you just uploaded. Click on the link to open the document to the right of the **Uploaded File** field.
11. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a screenshot displaying the Strategic Plan Edit Page.)

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Editing the Strategic Plan

Use these instructions to add additional files or upload a revised plan.

1. Click **Planning** from the main menu.
2. Click **Upload Strategic Plan** from the submenu.
3. From the Listing page, click the Edit button.
4. The Strategic Plan will appear in the edit mode.
5. Make any changes needed to the form.
6. Click **Save**. If you do not want to save any changes, click **Cancel**

Deleting an Uploaded Strategic Plan

1. Click **Planning** from the main menu.
2. Click **Upload Strategic Plan** from the submenu.
3. Click the Remove link next to the Strategic Plan that was uploaded.

Tips

- Previous fiscal year plans cannot be deleted. The Edit button will be replaced with a View button.

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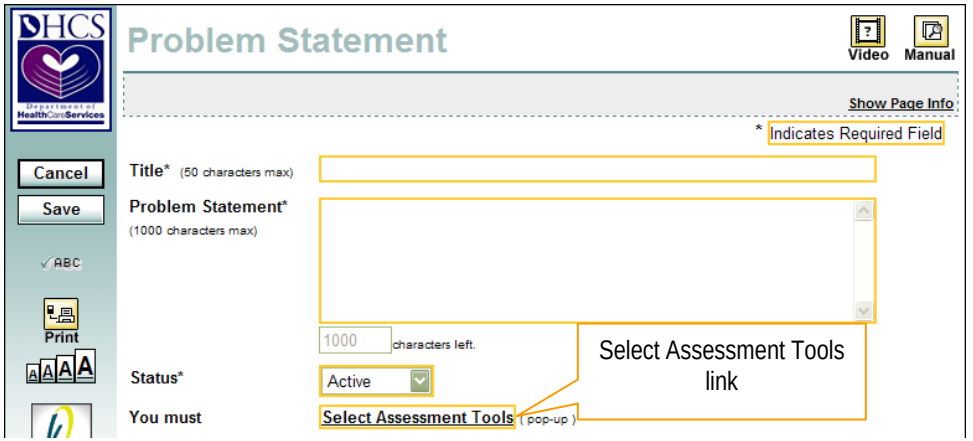
Problem Statements

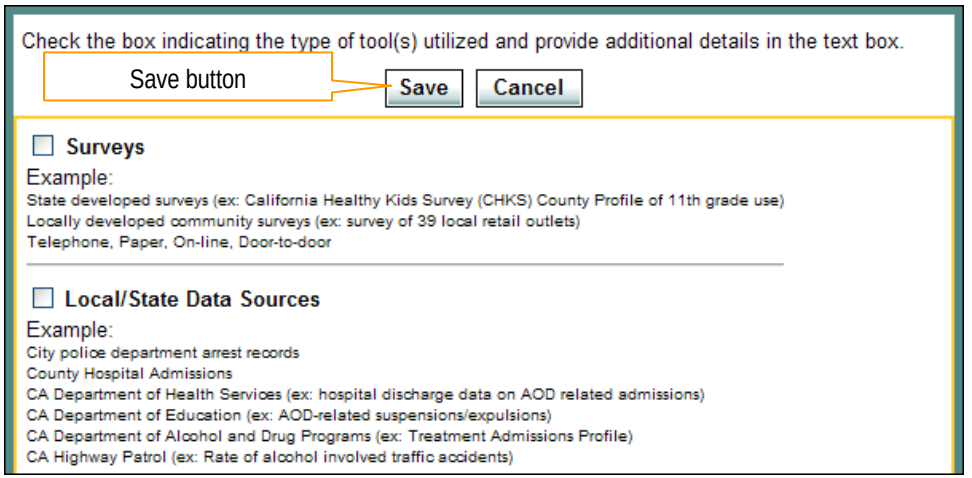
This section allows you to enter statements identifying the problems that need to be addressed within your community based on assessment results.

1. Click **Planning** from the main menu.
2. Click **Problem Statements** from the submenu.
3. Click **Add** from the left toolbar.
4. Enter a short description of the Problem Statement in the **Title*** field.
   *Note: This should be no longer than 50 characters.
5. Enter the **Problem Statement*** in the box.
6. The **Status*** is automatically defaults to *Active*.
7. Enter the assessment tools used to determine this problem statement by clicking the **Select Assessment Tools*** link. A new screen will appear displaying the Assessment/Evaluation Tools screen.



(This is a screenshot displaying the Problem Statement Edit Page.)

   a. Select the assessment tool(s) that was used to conduct the needs assessment by checking the box next to the assessment tool name (e.g., Surveys, Local/State Data Sources, etc.).
      i. To remove an assessment tool, uncheck the assessment tool name.
   b. A box will appear asking for details regarding that assessment tool. Enter the appropriate information in the box.
   c. Click **Save**. If you do not want to save any changes, click **Cancel**.
   d. The Assessment Tools screen will close and you are returned to the Problem Statement screen.
8. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a screenshot displaying the Assessment Tools page. This is a partial screenshot.)

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Tips

- The **Title** is a short description to identify the **Problem Statement** for reports and searching purposes.

Editing the Problem Statement

1. Click **Assessment** from the main menu.
2. Click **Problem Statements** from the submenu.
3. From the Listing page, select the **Problem Statement** that you wish to edit by clicking the Select button.
4. The **Problem Statement** will appear in the edit mode. The Title and Problem Statement cannot be changed.
    a. Status
        i. *Active*: currently in use.
        ii. *Inactive*: no longer in use.
    b. Assessment Tool
        i. Remove all the assessment tools by clicking the "Remove" button or click on "Select Assessment Tools" and add or remove individual assessment tools by checking or un-checking appropriate assessment boxes.
5. Make any changes needed to the form.
6. Click **Save**. If you do not want to save any changes, click **Cancel**.

Tips

- You will not be able to edit a Problem Statement once services/activities have been reported.

Deleting the Problem Statement

Problem Statements cannot be deleted.

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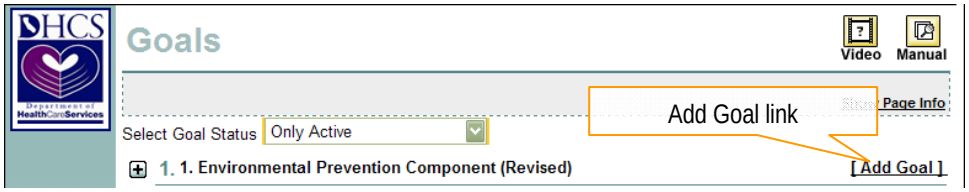
Goals

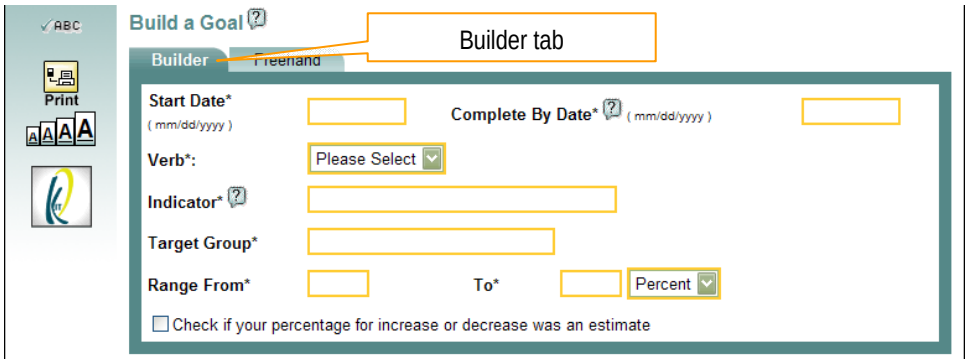
All goals will be linked to a Problem Statement. Use the instructions below to add a goal to a specific Problem Statement:

1. Click **Planning** from the main menu.
2. Click **Goals** from the submenu.
3. Click **Add Goal** to the right of the appropriate Problem Statement.



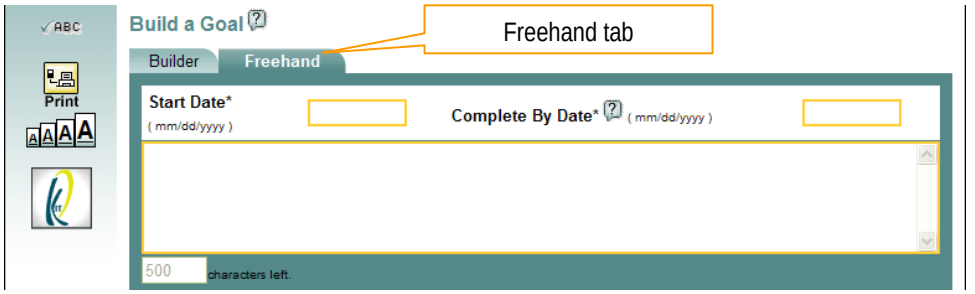
(This is a sample screenshot displaying the Goals Listing Page. This is a partial screenshot.)

4. To enter an increase/decrease based **Goal**, click on the **Builder** tab to display the Goal Builder Utility.
   a. Enter the **Start Date*** of this Goal as mm/dd/yyyy.
   b. Enter the **Complete By Date*** as mm/dd/yyyy.
   c. Choose either *Increase* or *Decrease* from the **Verb*** dropdown list.
   d. Enter the **Indicator***.
   e. Enter the **Target Group***.
   f. Insert values for baseline and desired outcome in the **Range From*** and **To*** fields.
   g. Select **Percent**, **Mean**, or **Total**.
   h. If the baseline value is an estimate, place your cursor over the box and left click your mouse to place a checkmark in the box.
   *Note: Actual baseline values will need to be reported in the evaluation module.



(This is a screenshot displaying the Goals Edit Page.)

5. To enter all other types of Goals, click on the **Freehand** tab.
   a. Enter the **Start Date*** of this Goal as mm/dd/yyyy.
   b. Enter the **Complete By Date*** as mm/dd/yyyy.
   c. Type in the Goal.



(This is a screenshot displaying the Goals Edit Page.)

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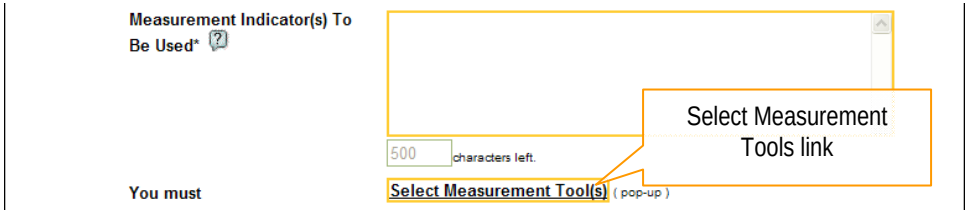
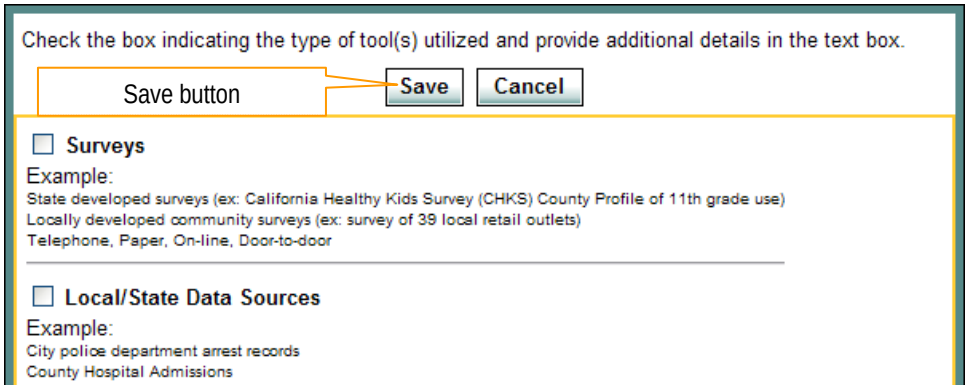
6. Enter the Measurement Indicator(s) to Be Used* to evaluate this goal.
7. Enter the measurement tools used by clicking the Select Measurement Tools* link. A new screen will appear displaying the Measurement Tools screen.



(This is a screenshot displaying the Goals Edit Page.)

   a. Select the measurement tool(s) that was used by checking the box next to the measurement tool name (e.g., Surveys, Local/State Data Sources, etc.).
      i. To remove a measurement tool, uncheck the tool name.
   b. A box will appear asking for details regarding that measurement tool. Enter the appropriate information in the box.
   c. Click Save. If you do not want to save any changes, click Cancel.
   d. The Measurement Tools screen will close and you are returned to the Problem Statement screen.



(This is a screenshot displaying the Assessment Tools page. This is a partial screenshot.)

8. Enter the Responsible Party*.
9. If applicable, enter any additional information regarding this goal in the Notes field.
10. Click Save. If you do not want to save any changes, click Cancel

(This is a screenshot displaying the Goals Edit Page.)

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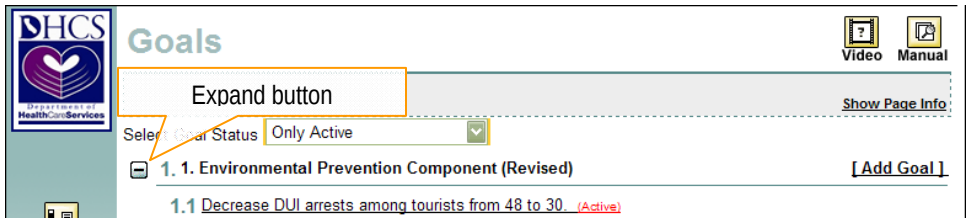
Editing a Goal

1. Click **Planning** from the main menu.
2. Click **Goals** from the submenu.
3. From the Listing page, click on the ⊞ next to the appropriate Problem Statement to view all of the Goals associated with that Problem Statement.
   *Note: Once the goals are in view, the ⊞ becomes a ⊟.
4. Click on the goal link (e.g., 1.1) to open the goal that you wish to edit.
5. The goal will appear in the edit mode. Only the Start Date and Complete By Date, the Measurement Indicators, Measurement Tools, Responsible Party and Notes fields can be edited.
6. Make any changes needed to the form.
7. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Goals Listing Page. This is a partial screenshot.)

Tips

- You will not be able to edit an entire Goal once services/activities have been reported for any objective linked to it. Only the Start Date and Complete By Date, the Measurement Indicators, Measurement Tools, Responsible Party and Notes fields can be edited.

Deleting a Goal

A goal cannot be deleted once it has been saved.

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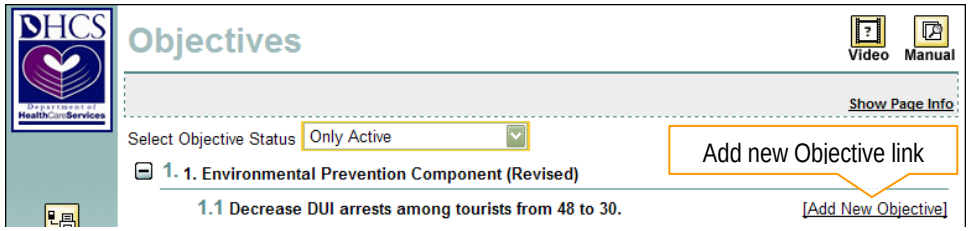
Objectives

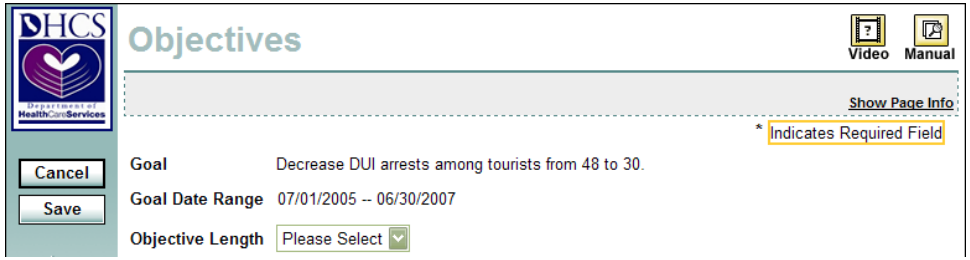
Objectives are linked to a Goal. The Objectives page is similar to the Goal page in regards to entering the data. Use the instructions below to enter an Objective.

1. Click **Planning** from the main menu.
2. Click **Objectives** from the submenu.
3. Click **Add New Objective** to the right of the appropriate Goal.



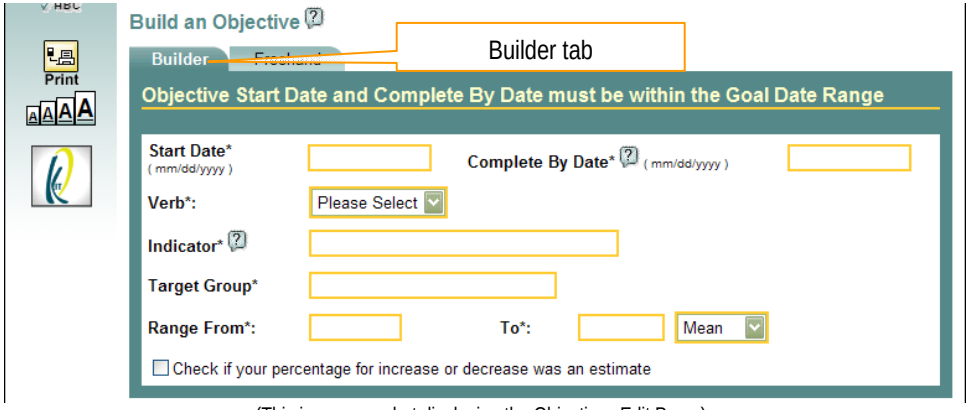
(This is a sample screenshot displaying the Objectives Listing Page. This is a partial screenshot.)

4. Select the **Objective Length** of this Objective.



(This is a sample screenshot displaying the Objectives Edit Page.)

5. To enter an increase/decrease **Objective**, click on the **Builder** tab to display the Objective Builder Utility.
    a. Enter the **Start Date*** of this Objective as mm/dd/yyyy.
    b. Enter the **Complete By Date*** as mm/dd/yyyy.
    c. Choose either *Increase* or *Decrease* from the **Verb*** dropdown list.
    d. Enter the **Indicator***.
    e. Enter the **Target Group***.
    f. Insert values for baseline and desired outcome in the **Range From*** and **To*** fields.
    g. Select **Percent**, **Mean**, or **Total**.
    h. If the baseline value is an estimate, place your cursor over the box and left click your mouse to place a checkmark in the box.
    *Note: Actual baseline values will need to be reported in the evaluation module.



(This is a screenshot displaying the Objectives Edit Page.)

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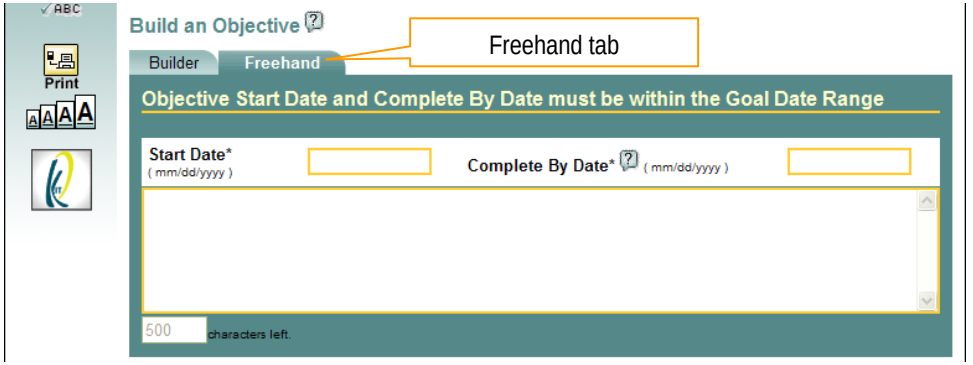
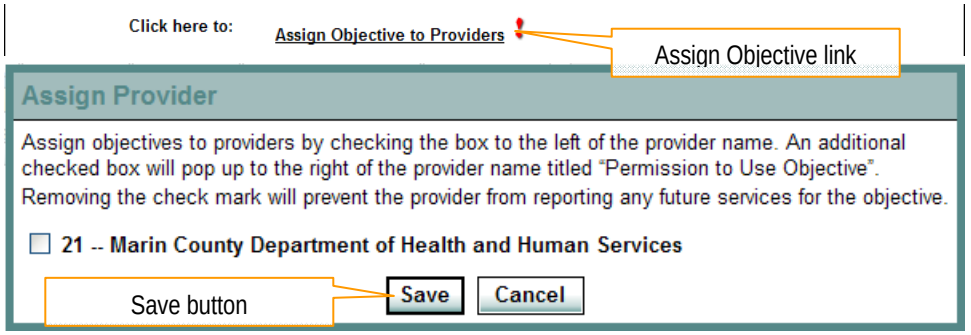
6. To enter all other types of Objectives, click on the Freehand tab.
   a. Enter the **Start Date*** of this Objective as mm/dd/yyyy.
   b. Enter the **Complete By Date*** as mm/dd/yyyy.
   c. Type in the Objective.



(This is a screenshot displaying the Objectives Edit Page.)

7. Click the Assign Objective to Providers link to assign an objective to a Provider. A new screen will appear displaying the Assign Provider screen.
   a. Select the Provider(s) to be assigned to the objective by checking the box next to the Provider's name.
      *Note: If all providers are to be assigned, clicking the **Check All** selection will check all of the Provider names.
      i. To remove a Provider, uncheck the Provider's name.
   b. Click **Save**. If you do not want to save any changes, click **Cancel**.
   c. The Assign Providers screen will close and you are returned to the Objective screen.



(This is a sample screenshot displaying the Assign Provider Page.)

8. If applicable, enter the **Measurement Indicator(s) to Be Used** to evaluate this objective.
9. Enter the measurement tools used by clicking the Select Measurement Tools link. A new screen will appear displaying the Measurement Tools screen.

(This is a screenshot displaying the Objectives Edit Page.)

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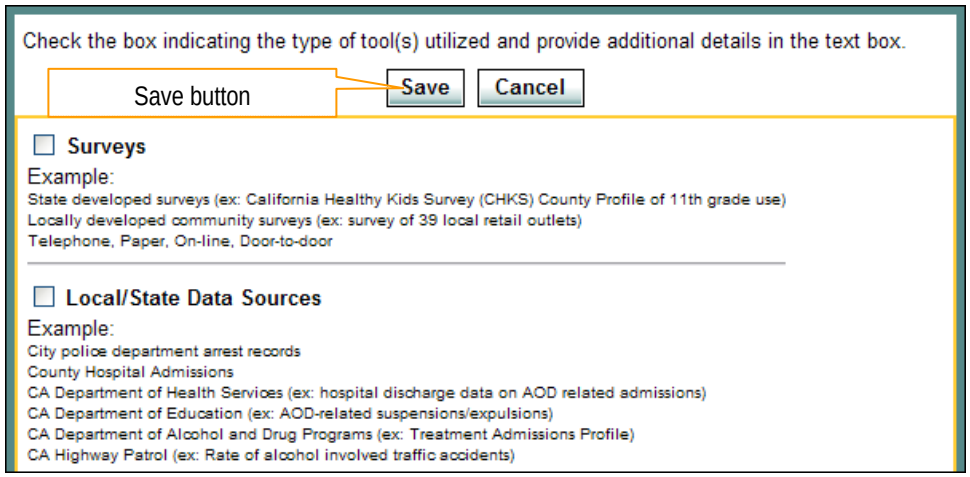
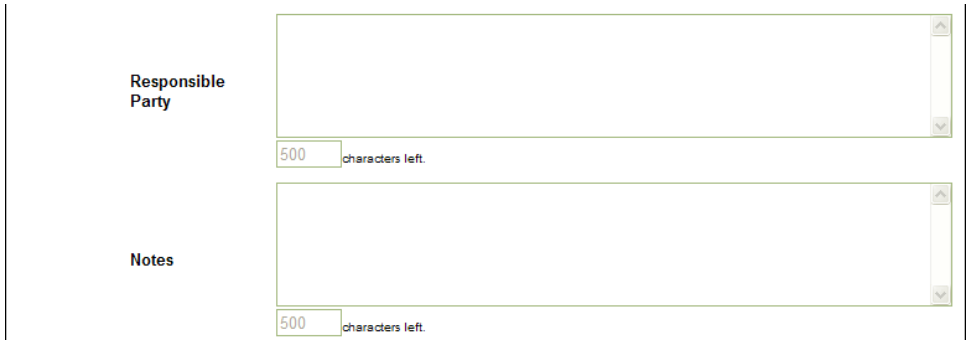
a. Select the measurement tool(s) that was used by checking the box next to the measurement tool name (e.g., Surveys, Local/State Data Sources, etc.).
    i. To remove a measurement tool, uncheck the tool name.
b. A box will appear asking for details regarding that measurement tool. Enter the appropriate information in the box.
c. Click **Save**. If you do not want to save any changes, click **Cancel**.
d. The Measurement Tools screen will close and you are returned to the Problem Statement screen.



(This is a screenshot displaying the Assessment Tools Screen. This is a partial screenshot.)

10. If applicable, enter the **Responsible Party**.
11. If applicable, enter any additional information regarding this objective in the **Notes** field.
12. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Objectives Edit Page.

Tips

- The county objectives link to the assigned provider(s), which link to services/activities. The provider objectives do not link to services. Only the county-assigned objectives will be available as a selection when reporting services in the Implementation module.

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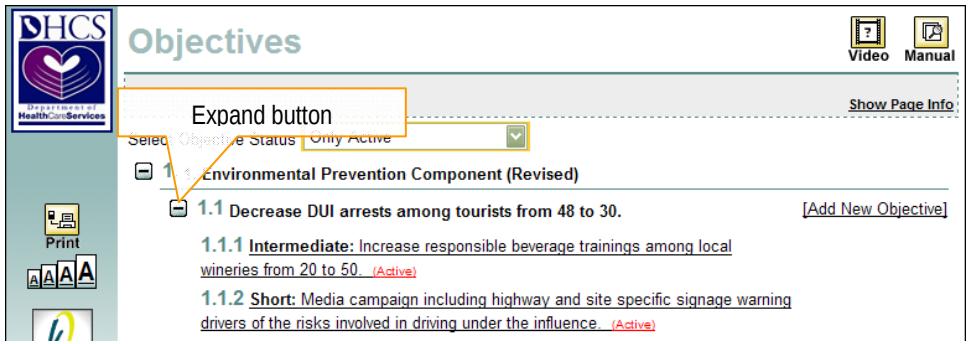
Editing an Objective

1. Click **Planning** from the main menu.
2. Click **Objectives** from the submenu.
3. From the Listing page, click on the ⊞ next to the appropriate Goal to view all of the Objectives associated with that Goal.
   *Note: Once the goals are in view, the ⊞ becomes a ⊟.
4. Click on the Objective link (e.g., 2.1) to open the Objective that you wish to edit.
5. The Objective will appear in the edit mode. Only the Start Date and Complete By Date, the Measurement Indicators, Measurement Tools, Responsible Party and Notes fields can be edited.
6. Make any changes needed to the form.
7. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Objectives Listing Page. This is a partial screenshot.)

Tips

- You will not be able to edit an entire Objective once services/activities have been reported against it. Only the Start Date and Complete By Date, the Measurement Indicators, Measurement Tools, Responsible Party and Notes fields can be edited.

Deleting an Objective

An objective cannot be deleted once it is saved.

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IMPLEMENTATION

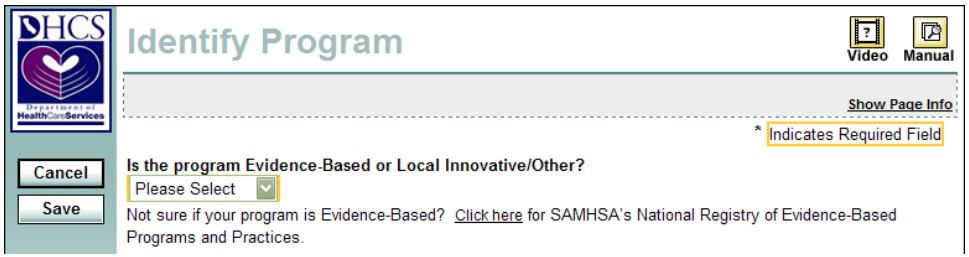
Implementing the prevention plan is done in the Implementation module.

Program Management

There are three categories under Program Management. Within Program Management, a County/Provider is able to register their programs, groups, and their participants.

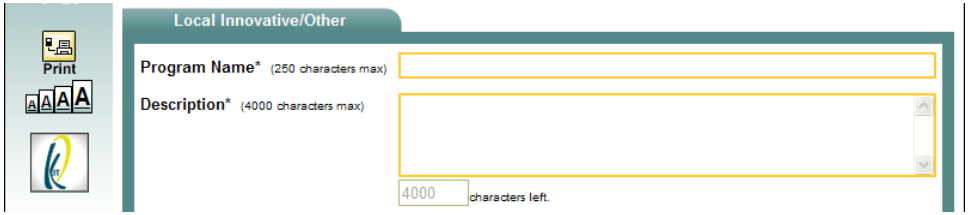
Identifying a Program

1. Click **Implementation** from the main menu.
2. Click **Program Management** from the submenu.
3. Click **Identify Programs** from the category list.
4. Click **Add** from the left toolbar.
5. There are two types of programs that can be registered in the Identify Programs module, *Evidence-Based* or *Local Innovative/Other*.
   Use the dropdown list to select the type of program you wish to register.



(This is a screenshot displaying the Identify Programs Edit Page.)

6. If you selected **Local Innovative/Other**, use the following instructions:
   a. Enter the **Program Name***.
   b. Enter the **Description*** of the program.



(This is a screenshot displaying the Identify Programs Edit Page.)

Tips

- A program must be identified in order to report services. Use the county office or provider name if specific programs are not used.

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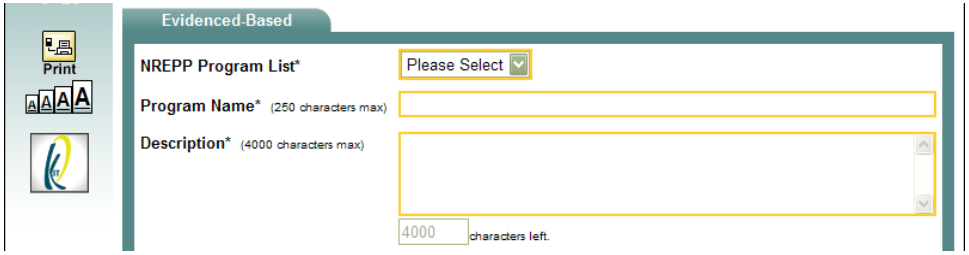
7. If you selected **Evidence-Based**, use the following instructions:
    a. Select the program from the NREPP **Program List*** from the dropdown list.
    b. Select the **Program Name*** from the dropdown list.
    *Note: Selections for this dropdown list will be available once a **Program Type** has been selected.
    c. The second **Program Name*** field will automatically fill in with what was selected from the first **Program Name** field. This field is used for modifications to the **Program Name**.
    d. Enter a description of the program in the **Description*** field.
    *Note: You may copy the description of the program from SAMHSA's website by clicking on the Info button to receive information on the program selected.

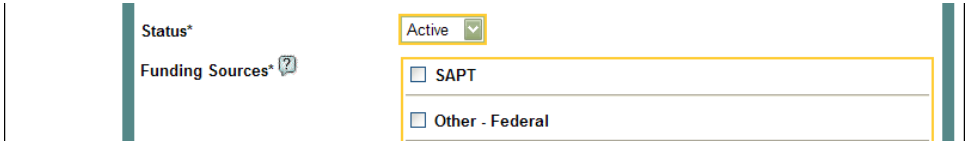


(This is a screenshot displaying the Identify Programs Edit Page.)

Tips

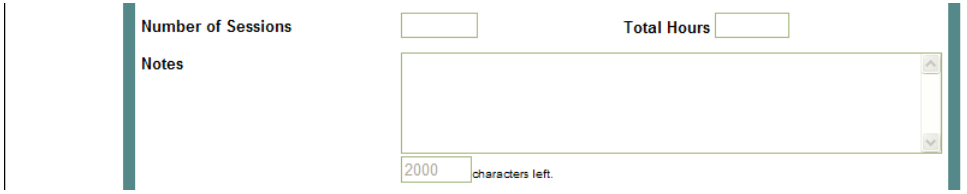
- Once an Evidenced-Based Program has been selected from the dropdown list, an **Info** link will appear to the right of, or below, the Program Name. Click on this link to view a description of the program.

8. The **Status*** automatically defaults to *Active*.
9. If this is a Friday Night Live (FNL) Program select the **FNL** checkbox.
*Note: For more information on FNL programs please see the FNL Manual located on the support website.
10. Select the **Funding Sources** you will be using for this Program.
    a. A box will appear to the right of the selected funding source asking you to enter a **% of total program funding**.



(This is a screenshot displaying the Identify Programs Edit Page.)

11. If desired, enter in the **Number of Sessions** and **Total Hours**.
12. Type in any additional information regarding this Program in the **Notes** field.
13. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a screenshot displaying the Identify Programs Edit Page.)

Tips

- For FNL Providers, see the FNL User Manual located on the Support Site.

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Editing Programs

1. Click **Implementation** from the main menu.
2. Click **Program Management** from the submenu.
3. Click **Identify Programs** from the category list.
4. From the Listing page, select the Program that you wish to edit by clicking the Select button.
5. The Program will appear in the edit mode.
6. Make any changes needed to the form.
    a. Status*
        i. *Active*: program is currently in use.
        ii. *Inactive*: program is no longer in use.
7. Click **Save**. If you do not want to save any changes, click **Cancel**.

Deleting Programs

1. Click **Implementation** from the main menu.
2. Click **Program Management** from the submenu.
3. Click **Identify Programs** from the category list.
4. From the Listing page, select the Program that you wish to delete by clicking the Select button.
5. The Program will appear in the edit mode.
6. Click **Delete** from the left toolbar.
7. Click **OK** when asked "Are you sure?". If you do not want to delete this program, click **Cancel**.

Tips

- You will not be able to delete a Program if a service/activity or a group has been reported against it. You will need to change the status to *Inactive*.

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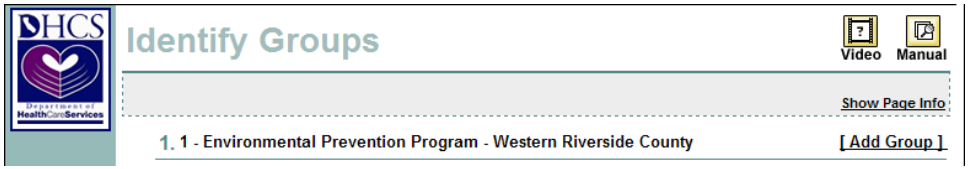
Identifying Groups

To prevent duplicated counts in recurring services/activities, you should identify a group.

1. Click **Implementation** from the main menu.
2. Click **Program Management** from the submenu.
3. Click **Identify Groups** from the category list.
4. Click **Add Group** to the right of the appropriate Program.

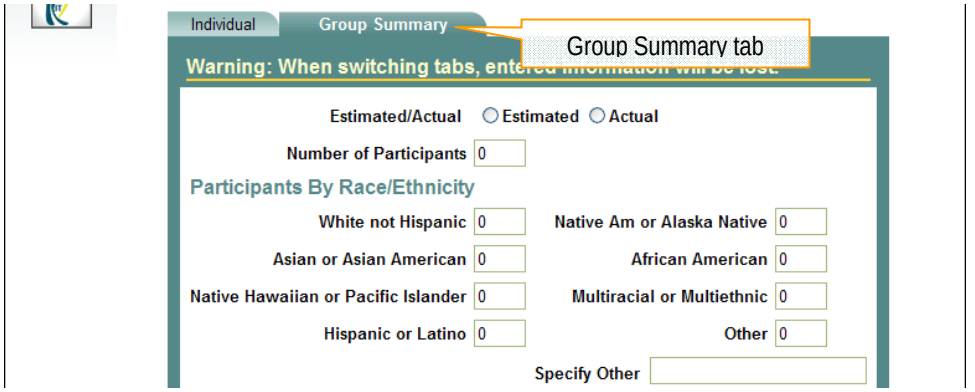


(This is a sample screenshot displaying the Identify Groups Listing Page. This is a partial screenshot.)

5. Type in the name of the group to identify it by in the **Group Name*** field.
   *Note: This should be no longer than 50 characters.
6. Enter a description of the group in the **Group Description*** field.
7. Enter the date of when the group was formed in the **Date Established** field as mm/dd/yyyy.
8. The **Status*** automatically defaults to *Active*.
9. There are two types of groups that can be registered in the Identify Groups module, Individual or Group Summary. Select the type of group you wish to register.

(This is a sample screenshot displaying the Identify Groups Edit Page.)

10. If you selected Group Summary, use the following instructions:
    a. Select whether the numbers being entered are an estimation using the **Estimated/Actual** radio buttons.
    b. Enter the total **Number of Participants** for this group.
    c. Enter the number of **Participants By Race/Ethnicity** in the appropriate categories.
       *Note: If a number was entered in **Other**, please specify what the Race/Ethnicity is within the **Specify Other** field.
    d. Enter the number of **Participants By Gender** in the appropriate categories.



(This is a sample screenshot displaying the Identify Groups Edit Page.)

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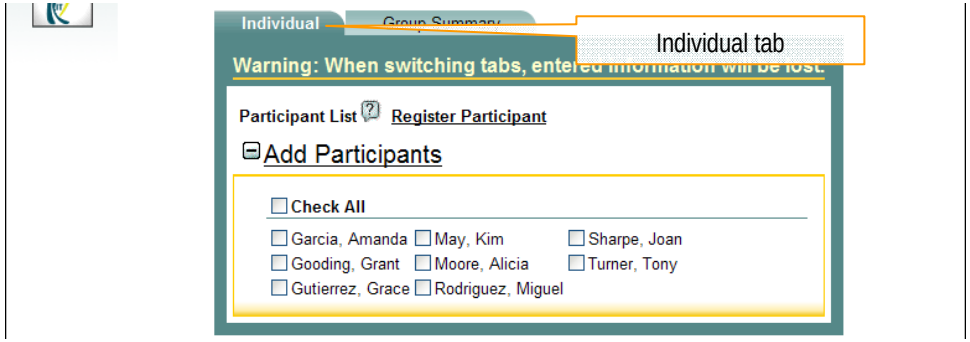
e. Enter the number of **Participants By Age Group** in the appropriate categories.

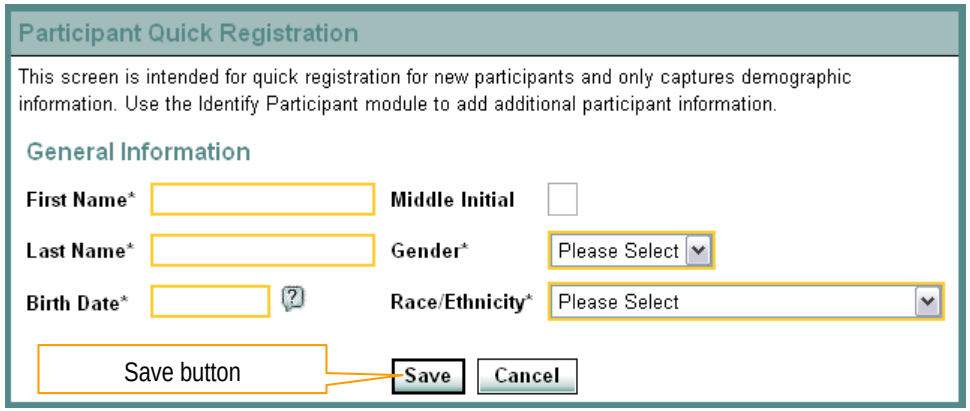
11. If you selected **Individual**, use the following instructions:
    a. Click on the ⊞ next to **Add Participants** to view all of the participants registered.
       Note: Once the participants are in view, the ⊞ becomes a ⊟.
    b. Select the participant(s) to be member's of the group by checking the box next to the participants' names.
       *Note: If all participants are members of the group, clicking the **Check All** selection will check all of the participant names.
       i. To remove a participant, uncheck the participant's name.
    c. If you wish to register participants directly associated with this group, click the **Register Participant** Link. A new screen will appear displaying the necessary fields needed to register a participant.
       *Note: To register more than one or two participants, and to complete the rest of the information on the participants registered from this screen, go to Identifying Participants module.



(This is a sample screenshot displaying the Identify Groups Edit Page.)

i. Enter in all required information regarding the participant.
   *Note: For instructions on registering a participant, see Identifying Participants.
ii. Click **Save**. If you do not want to save any changes, click **Cancel**.
iii. The Participant Quick Registration screen will close and you are returned to the Identify Group screen.
iv. Select the newly registered participant to be a member of the group by checking the box next to the participant's name.

12. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Participant Quick Registration Page.)

Tips

- Determine a unique naming structure for the **Group Names** prior to data entry to ensure consistency.
- Group information cannot be decreased once a service/activity has been added to CalOMS Prevention.

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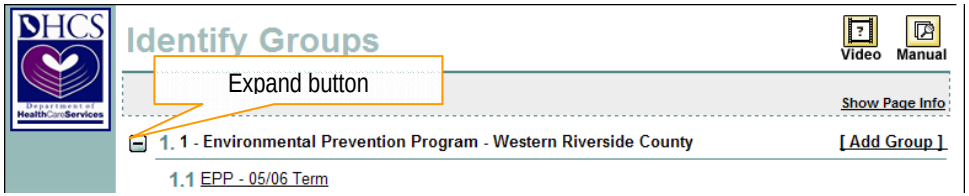
- The group **Status** can be changed to *Inactive* ONLY if a group series (under Recurring Services) is set to *Cancelled* or *Completed* OR if the Recurring Strategy is set to *Cancelled* or *Completed* (regardless of the Status of the group series).

Editing Groups

1. Click **Implementation** from the main menu.
2. Click **Program Management** from the submenu.
3. Click **Identify Groups** from the category list.
4. From the Listing page, click on the ⊞ next to the appropriate Program to view all of the Groups associated with that Program.
   *Note: Once the groups are in view, the ⊞ becomes a ⊟.
5. Click on the group link (e.g., 1.1) to open the group that you wish to edit.
6. The group will appear in the edit mode.
7. Make any changes needed to the form.
   a. Status*
      i. *Active*: Group is currently in use.
      ii. *Inactive*: Group is no longer in use.
8. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Identify Groups Listing Page. This is a partial screenshot.)

Tips

- Once a group is set up and saved, either with individual participants or a group summary, you will not be able to change the group type (Individual or Group Summary) when in edit mode.
- You will not be able to remove individual participants or reduce the total number in the Group Summary if a service/activity has been reported against it. You will be able to add individual participants, increase the total number in the Group Summary, or make an individual participant *Inactive*.

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Deleting Groups

1. Click **Implementation** from the main menu.
2. Click **Program Management** from the submenu.
3. Click **Identify Groups** from the category list.
4. From the Listing page, click on the ⊞ next to the appropriate Program to view all of the Groups associated with that Program.
   *Note: Once the groups are in view, the ⊞ becomes a ⊟.
5. Click on the group link (e.g., 1.1) to open the group that you wish to delete.
6. The group will appear in the edit mode.
7. Click **Delete** from the left toolbar.
8. Click **OK** when asked "Are you sure?". If you do not want to delete this program, click **Cancel**.

Tips

- You will not be able to delete a group if participants have been assigned to it. In these instances, mark the group as ***Inactive***.

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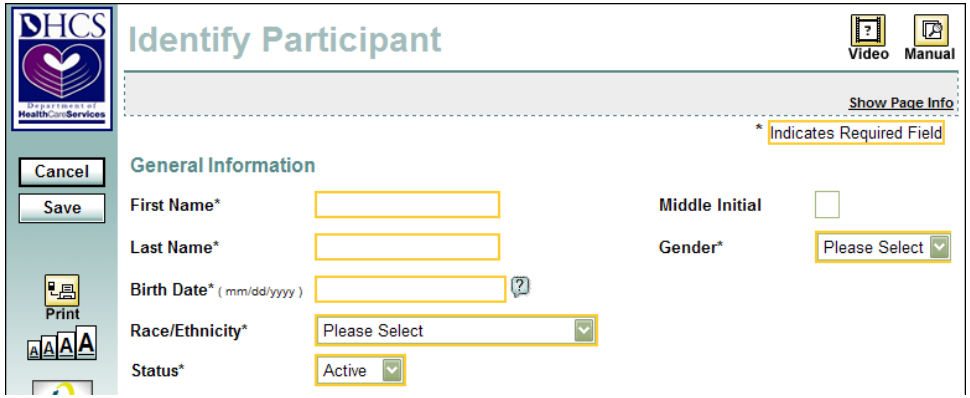
Identifying Participants

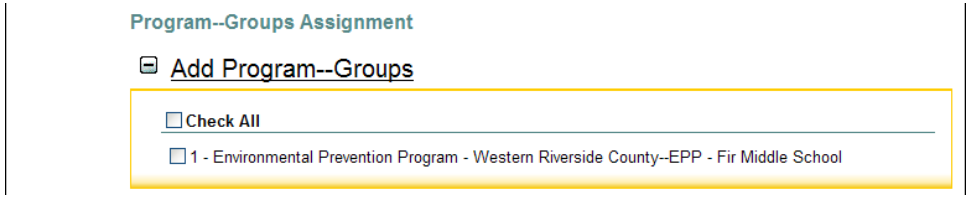
Registering participants into CalOMS Prevention is *optional* for tracking attendance in recurring services. The information entered in this area is considered confidential and is subject to the Health Insurance Portability and Accountability Act of 1996, Public Law 104-191 (HIPAA), and 42CFR. It is each provider's responsibility to ensure their business processes for confidentiality of personal information meet HIPAA and 42CFR requirements. **The information entered can only be viewed by the county or provider entering the information**. Only demographic information will be reported at the county/state level.

1. Click **Implementation** from the main menu.
2. Click **Program Management** from the submenu.
3. Click **Identify Participants** from the category list.
4. Click **Add** from the left toolbar.
5. Type in the participant's **First*** and **Last Name***.
6. Select the participant's **Gender*** from the dropdown field.
7. Enter the participant's **Birth Date*** as mm/dd/yyyy.
8. Select the participant's **Race/Ethnicity*** from the dropdown list.
9. The **Status*** automatically defaults to *Active*.
10. If desired, enter in the Additional Information.
11. If you know the participant's Contact and/or Emergency Contact Information, you can fill them into the appropriate fields.



(This is a screenshot displaying the Identify Participants Edit Page.)

12. Select the Program-Group pairs to be assigned to this participant from the Program—Groups Assignment section.
    a. Click on the ⊞ next to Add Program--Groups to view all of the Program-Group pairs registered.
       *Note: Once the members are in view, the ⊞ becomes a ⊟.
    b. Select those Program-Group pairs to be assigned to this participant by checking the box next to the Program-Group pair name.
       *Note: If all Program-Group pairs are to be assigned, clicking the **Check All** selection will check all of the Program-Group pair names.
        i. To remove a Program-Group pair, uncheck the Program-Group pair name.
13. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Identify Participants Edit Page.)

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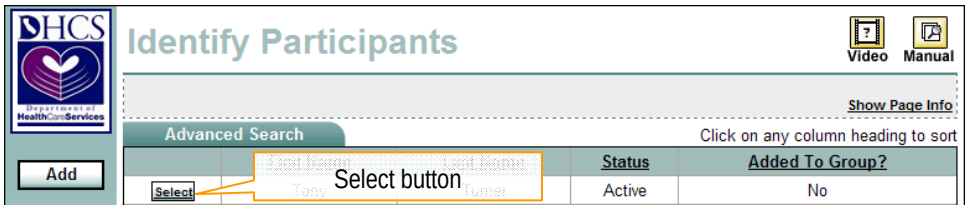
Editing Participant Information

1. Click **Implementation** from the main menu.
2. Click **Program Management** from the submenu.
3. Click **Identify Participants** from the category list.
4. From the Listing page, select the participant that you wish to edit by clicking the Select button.
5. The participant will appear in the edit mode.
6. Make any changes needed to the form.
    a. Status*
        i. *Active*: participant is currently attending programming.
        ii. *Inactive*: participant is no longer attending programming.
7. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Identify Participants Listing Page. This is a partial screenshot.)

Deleting Participant Information

1. Click **Implementation** from the main menu.
2. Click **Program Management** from the submenu.
3. Click **Identify Participants** from the category list.
4. From the Listing page, select the participant that you wish to delete by clicking the Select button.
5. The participant will appear in the edit mode.
6. Click **Delete** from the left toolbar.
7. Click **OK** when asked "Are you sure?". If you do not want to delete this item, click **Cancel**.

Tips

- You will not be able to delete individual participants if they have been assigned to a group and a recurring service has been reported against it. In these instances, mark the individual participant to *Inactive*.

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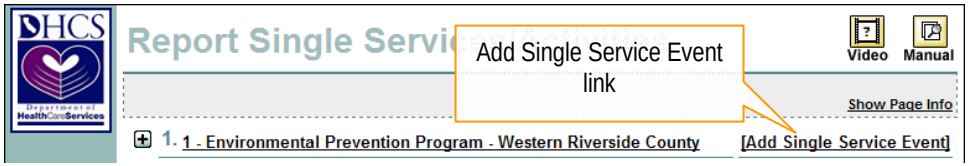
Reporting Single Services

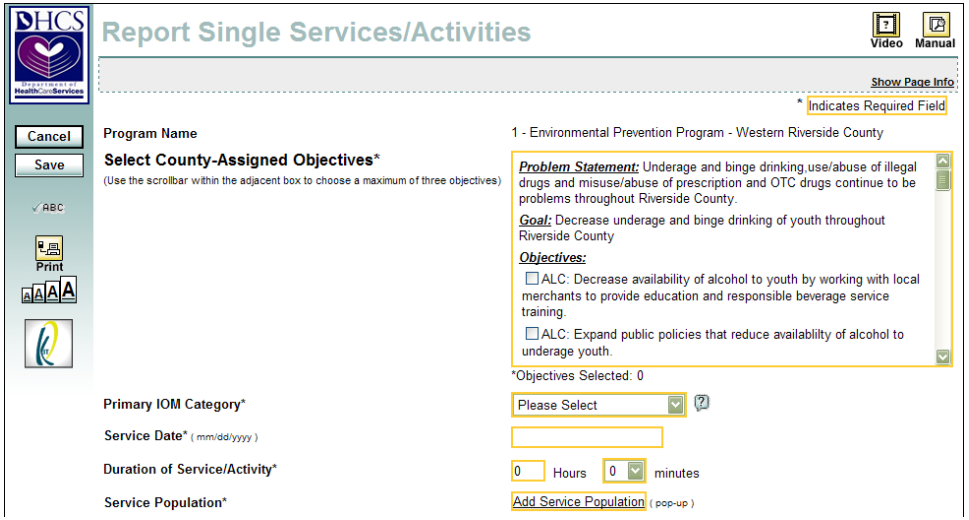
A Single Service/Activity is a one-time occurrence. Single Services/Activities are directly associated with a Program that was registered in the Identify Programs module.

1. Click **Implementation** from the main menu.
2. Click **Report Single Services** from the submenu.
3. Click **Add Single Service Event** to the right of the appropriate Program.
   *Note: If the program is evidence–based, a message will ask if you wish to continue.



(This is a sample screenshot displaying the Single Service Activities Listing Page. This is a partial screenshot.)

4. In the **Select County-Assigned Objective*** section, scroll to find the appropriate Problem Statement and Goal and use the checkboxes to select the desired objective(s) associated with that goal.
   *Note: This list populates from the objectives that have been registered by the county.
5. Select the **Primary IOM Category*** of this event.
   a. *Indicated*: targets high risk individuals and/or those individuals exhibiting signs of early substance use
   b. *Selective*: targets subsets of the total population with high risk factors
   c. *Universal:* targets the entire population or demographic subset, not based on risk
6. Enter the date of the event from the **Service Date*** field as mm/dd/yyyy.
7. Enter the **Duration of Service/Activity***.
   *Note: You may leave a zero in one of the fields, but at least one of the fields must have an amount higher than zero.
   a. Enter the number of hours in the **Hours** field.
   b. Select any *minutes* from the dropdown list.
8. Enter the **Service Population*** by clicking the Add Service Population link. A new screen will appear displaying the Service Population screen.



(This is a sample screenshot displaying the Single Service Activities Edit Page.)

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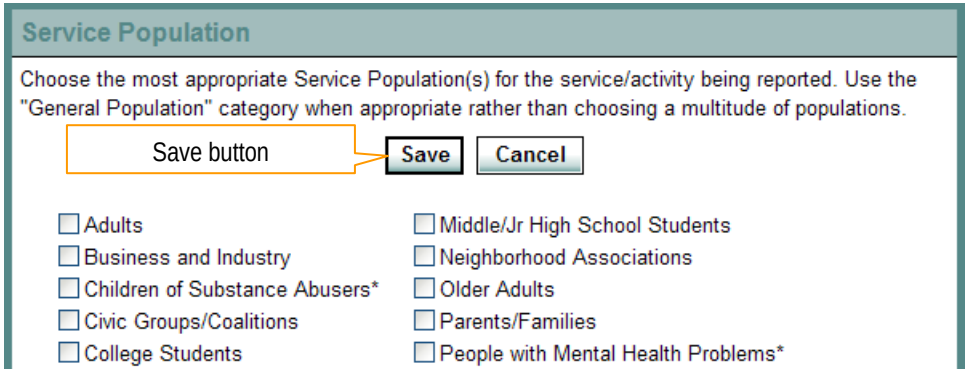
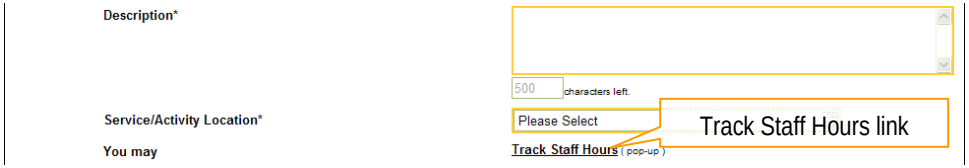
a. Select the population(s) you wish to add to this event by checking the box next to the population name.
*Note: If all populations need added, select "General Population" from the list.
    i. To remove a population, uncheck the population name.
b. Click **Save**. If you do not want to save any changes, click **Cancel**.
c. The Service Population screen will close and you are returned to the Single Services/Activities screen.



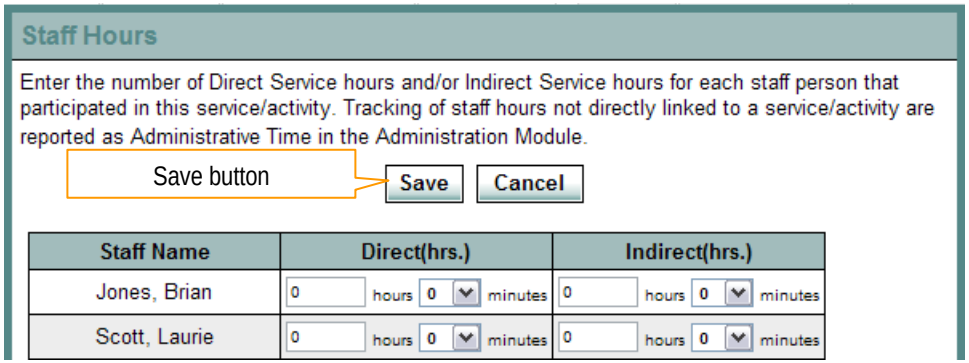
(This is a screenshot displaying the Service Population Page. This is a partial screenshot.)

9. Enter the description of the service event in the **Description*** field.
10. Select the **Service/Activity Location*** where this event took place from the dropdown list.
11. Click the **Track Staff Hours** link to enter Staff time. A new screen will appear displaying the Staff Hours screen.



(This is a screenshot displaying the Single Service Activities Edit Page.)

a. Enter the number of **Direct (hrs)** and/or **Indirect (hrs)** next to the staff member(s) that worked on or delivered the event by entering an amount in the *hours* field and selecting any *minutes* from the dropdown list.
*Note: You may report staff time for more than one staff member who worked on the event.
    i. **Direct (hrs.)**: time spent face-to-face at the event
    ii. **Indirect (hrs.)**: time spent on preparing and/or performing follow-up duties for the event – any support time associated with the event.
b. Click **Save**. If you do not want to save any changes, click **Cancel**.
c. The Staff Hours screen will close and you are returned to the Single Services/Activities screen.



(This is a sample screenshot displaying the Staff Hours Page. This is a partial screenshot.)

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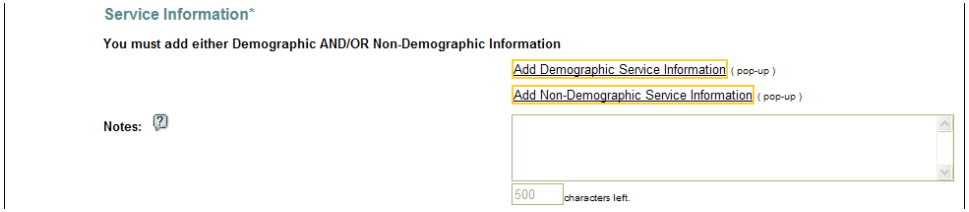
12. Enter in the Service Information*. You must add Demographic AND/OR Non-Demographic information to your event.
    *Note: For detailed information on entering in Demographic Services and/or Non-Demographic Services, see Adding Demographic and/or Non-Demographic Services.
13. If desired, enter any other information regarding this event in the Notes field.
14. Click Save. If you do not want to save any changes, click Cancel.



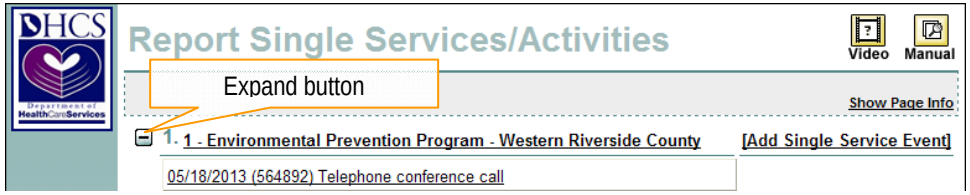
(This is a screenshot displaying the Single Service Activities Edit Page.)

Tips

- If an Objective has not been assigned to a provider yet, a single service/activity event cannot be added. The county must go to the Planning module to assign objectives to a provider(s). See Objectives for details.
- Once an objective is selected, it is highlighted yellow.
- From the report single service listing page, if you click on the program name, you can go directly to the program description form.
- Typically services for evidenced-based programs are entered as recurring services. If the program is evidence–based, you will be asked if you wish to continue. Click OK to continue or Cancel to go back to the previous page.

Editing Single Services/Activities

1. Click Implementation from the main menu.
2. Click Report Single Services/Activities from the submenu.
3. From the Listing page, click on the ⊞ next to the appropriate Program to view all of the services associated with that Program.
   *Note: Once the services are in view, the ⊞ becomes a ⊟.
4. Click on the service link (e.g., 1.1) to open the event that you wish to edit.
5. The services will appear in the edit mode.
6. Make any changes needed to the form.
7. Click Save. If you do not want to save any changes, click Cancel.



(This is a sample screenshot displaying the Single Service Activities Listing Page. This is a partial screenshot.)

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Deleting Single Services/Activities

1. Click **Implementation** from the main menu.
2. Click **Report Single Services/Activities** from the submenu.
3. From the Listing page, click on the ⊞ next to the appropriate Program to view all of the services associated with that Program.
   *Note: Once the service are in view, the ⊞ becomes a ⊟.
4. Click on the service link (e.g., 1.1) to open the event that you wish to delete.
5. The services will appear in the edit mode.
6. Click **Delete** from the left toolbar.
7. Click **OK** when asked “Are you sure?”. If you do not want to delete this program, click **Cancel**.

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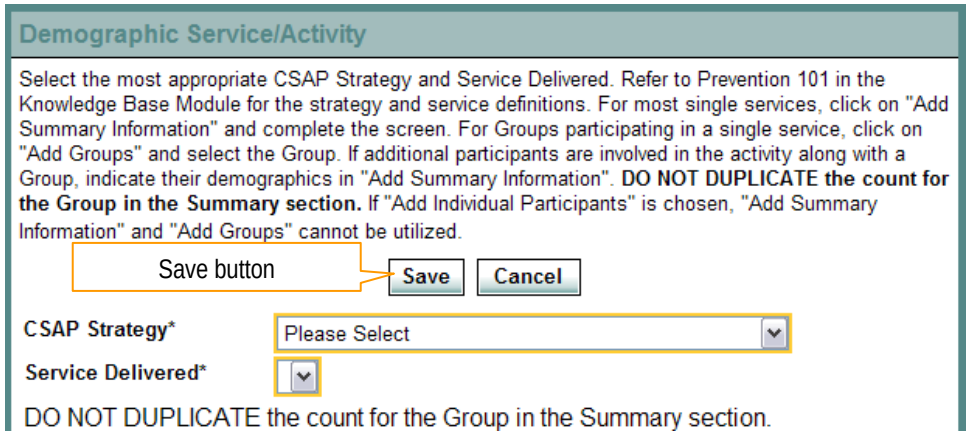
Adding Demographic and/or Non-Demographic Services

While in Reporting Single Service/Activity, you must add demographic and/or non-demographics services to your event. This is a *required* task.

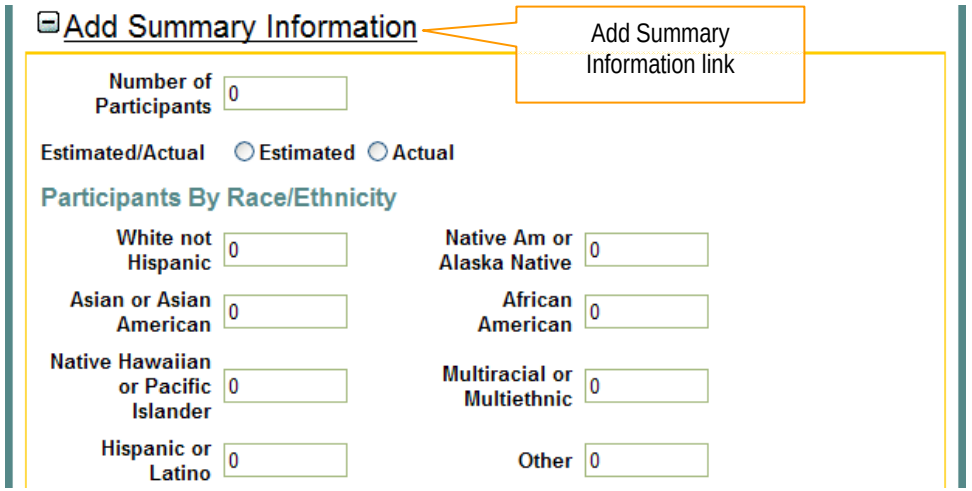
Demographic services track the number of people or individual participants at a service, whereas *non-demographic* services track the number of items disseminated at a service or denote engagement in activities.

1. From the Report Single Service/Activity Screen, click the Add Demographic Service Information link.
   A new screen will appear displaying the Service/Activity Demographics screen.
2. Select the CSAP Strategy* from the dropdown list.
3. Select the Service Delivered* associated with this group from the dropdown list.
   *Note: Selections for this dropdown list will be available once a CSAP Strategy has been selected.
4. There are three types of groups that can be tracked in the Service/Activity Demographics screen, Summary Information, Groups or Individual Participants (Single Service Only). Select the type you wish to track by clicking on the ⊞.



(This is a screenshot displaying the Demographic Service Activities Edit Page.)

5. If you selected ⊞ Add Summary Information, use the following instructions:
   a. Enter the total Number of Participants for this group.
   b. Select whether the numbers being entered are an estimation using the Estimated/Actual radio buttons
   c. Enter the number of Participants By Race/Ethnicity in the appropriate categories.
      *Note: If a number was entered in Other, please specify what the Race/Ethnicity is within the Specify Other field.
   d. Enter the number of Participants By Gender in the appropriate categories.
   e. Enter the number of Participants By Age Group in the appropriate categories.



(This is a screenshot displaying the Demographic Service Activities Edit Page. This is a partial screenshot.)

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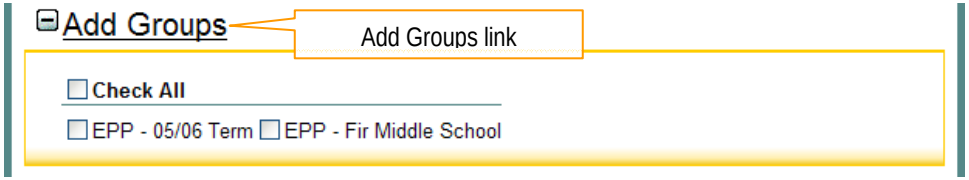
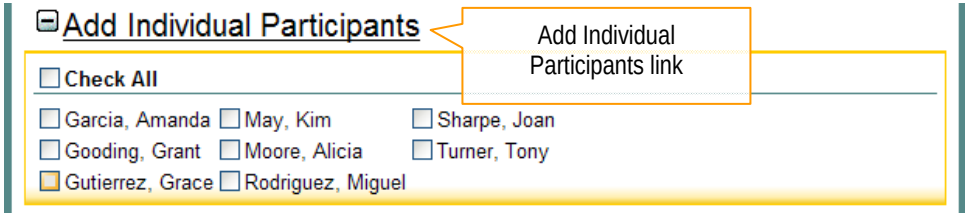
6. If you selected ⊞ Add Groups, use the following instructions:
    a. Select the group you wish to add to this event by checking the box next to the group name.
    *Note: If all groups need added, clicking the **Check All** selection will check all of the group names.
        i. To remove a group, uncheck the group name.



(This is a sample screenshot displaying the Demographic Service Activities Edit Page.)

7. If you selected ⊞ Add Individual Participants, use the following instructions:
    a. Select the participant you wish to add to this event by checking the box next to the participant name.
    *Note: If all participants need added, clicking the **Check All** selection will check all of the participant names.
        i. To remove a participant, uncheck the participant name.
8. Click **Save**. If you do not want to save any changes, click **Cancel**.
9. The Service/Activity Demographics screen will close and you are returned to the Single Services/Activities screen.



(This is a sample screenshot displaying the Demographic Service Activities Edit Page.)

Tips

- The CSAP Strategy, "Information Dissemination" will not appear in the **CSAP Strategy*** dropdown list. To enter "Information Dissemination" information, see Add Non-Demographic Service Information.
- For Groups participating in a single event, select the Group under "Add Group". If additional participants are involved in the event, indicate their demographics under "Summary". DO NOT DUPLICATE the count for the Group in the Summary section.
- Once saved, a message will appear below the Add Demographic Service Information link showing the number of groups and/or people reported against the service/activity. A Remove button will become active next to that message. Click the Remove button to delete the demographic information entered, if needed.

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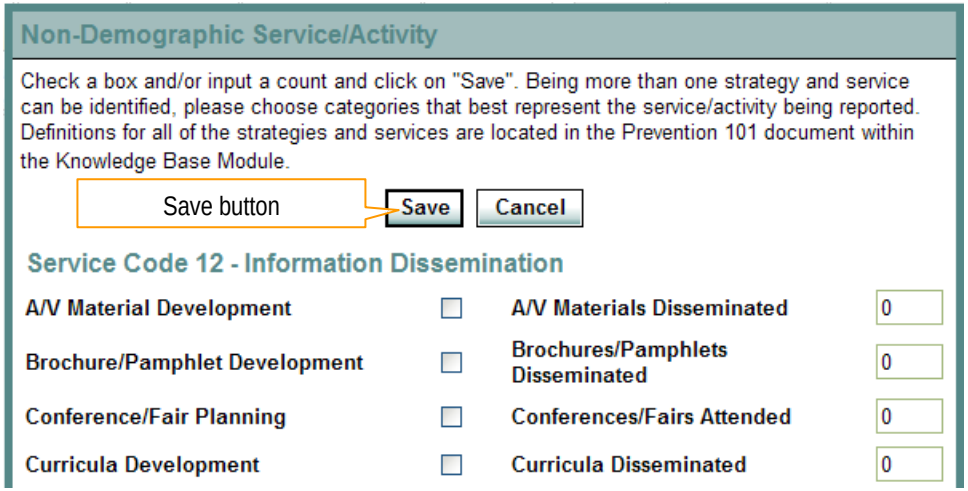
Non-Demographic Services

1. From the Report Single Services/Activities screen or Report Recurring Services/Activities screen, click the Add Non-Demographic Service Information link. A new screen will appear displaying the Service/Activity Non-Demographics screen.
2. Select all non-demographics items that apply or enter the number of non-demographic items that were used/disseminated during the event in the appropriate fields.
3. Click **Save**. If you do not want to save any changes, click **Cancel**.
4. The Service/Activity Non-Demographics screen will close and you are returned to the Report Services/Activities screen.



(This is a screenshot displaying the Non-Demographic Service Activities Edit Page. This is a partial screenshot.)

Tips

- Both Demographic and Non-Demographic services may be reported for a Single Service/Activity.
- Once saved, a message will appear below the Add Non-Demographic Service Information link showing the number of groups and/or people reported against the service/activity. A Remove button will become active next to that message. Click the Remove button to delete the non-demographic information entered, if needed.

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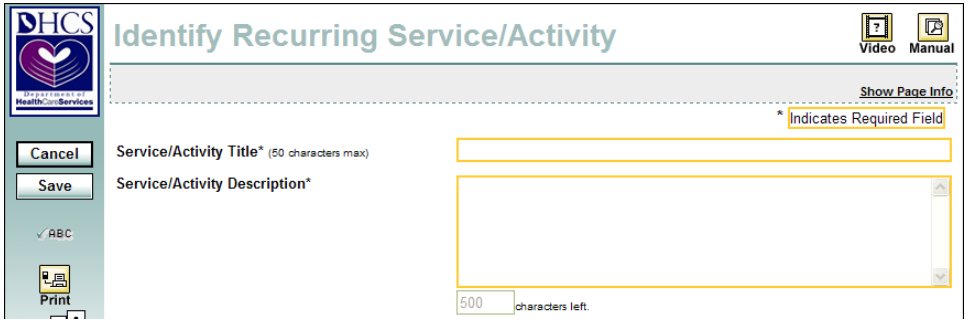
Recurring Services Management

There are two categories under Recurring Services Management. Within Recurring Services Management, a county/provider is able to identify their recurring services and enter in the series of services/activities.

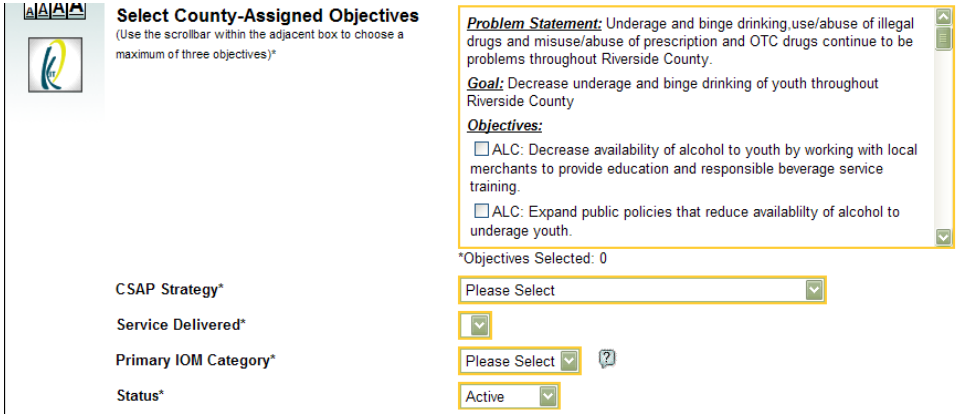
Identifying Recurring Services

1. Click **Implementation** from the main menu.
2. Click **Recurring Services Management** from the submenu.
3. Click **Identify Recurring Services** from the category list.
4. Click **Add** from the left toolbar.
5. Enter a **Service/Activity Title*** that describes the series of events that you are reporting (e.g. Chapter Meetings).
6. Enter a description in the **Service/Activity Description*** field.



(This is a screenshot displaying the Recurring Services Activities Edit Page.)

7. In the **Select County-Assigned Objective*** section, scroll to find the appropriate Problem Statement and Goal and use the checkboxes to select the desired objective(s) associated with that goal.
   *Note: This list populates from the objectives that have been registered by the county.
8. Select the **CSAP Strategy*** from the dropdown list.
9. Select the **Service Delivered*** associated with this Recurring Service/Activity from the dropdown list.
   *Note: Selections for this dropdown list will be available once a CSAP Strategy has been selected.
10. Select the **Primary IOM Category*** of this event from the dropdown list.
    a. *Indicated*: targets high risk individuals and/or those individuals exhibiting signs of early substance use
    b. *Selective*: targets subsets of the total population with high risk factors
    c. *Universal:* targets the entire population or demographic subset, not based on risk
11. The **Status*** automatically defaults to *Active*.
12. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Recurring Services Activities Edit Page.)

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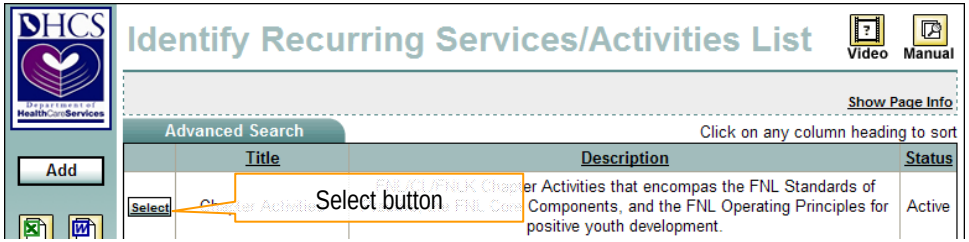
Tips

- If an Objective has not been assigned to a provider yet, a recurring service/activity series cannot be added. The county must go to the Planning module to assign objectives to a provider(s). See Objectives for details.
- Once an objective is selected, it is highlighted yellow.
- For subsequent recurring activities, the Service Population and Location will default to the items selected in the first activity.

Editing Recurring Services

1. Click **Implementation** from the main menu.
2. Click **Recurring Services Management** from the submenu.
3. Click **Identify Recurring Services** from the category list.
4. From the Listing page, select the Title that you wish to edit by clicking the **Select** button.
5. The Title will appear in the edit mode.
6. Make any changes needed to the form.
    a. Status
        i. *Active*: the series of events is currently in use.
        ii. *Completed*: the series of events has been completed.
        iii. *Cancelled*: the series of events has been cancelled and is no longer in use.
7. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Recurring Services Activities Listing Page. This is a partial screenshot.)

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Deleting Service/Activity Title Information

1. Click **Implementation** from the main menu.
2. Click **Recurring Services/Activities Management** from the submenu.
3. Click **Identify Recurring Services/Activities** from the category list.
4. From the Listing page, select the Title that you wish to delete by clicking the Select button.
5. The Title will appear in the edit mode.
6. Click **Delete** from the left toolbar.
7. Click **OK** when asked "Are you sure?". If you do not want to delete this item, click **Cancel**.

Tips

- Service/Activity Title information cannot be deleted if services have been reported against it. In these instances, change the status of the Service/Activity Title to ***Inactive***.

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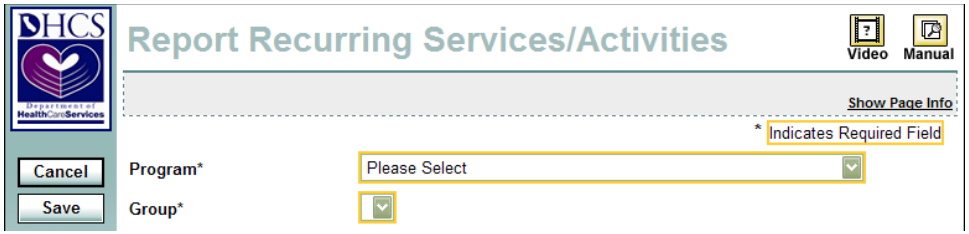
Reporting Recurring Services

1. Click **Implementation** from the main menu.
2. Click **Recurring Services Management** from the submenu.
3. Click **Report Recurring Services** from the category list.
4. To enter the first service/activity in a series, click **Add New Group Series** to the right of the appropriate Service/Activity Title.
    a. To enter succeeding services/activities, first click the ⊞ next to the Service/Activity Title to display the Program-Group pairs associated with the title.
    b. Click the **Add New Event** link to the right of the Program-Group pair you wish to add a new service/activity to.

(This is a sample screenshot displaying the Recurring Services Activities Listing Page. This is a partial screenshot.)

5. Select the Program for this New Group Series from the **Program** dropdown list.
6. Select the Group from the **Group** dropdown list.
   *Note: Selections for this dropdown list will be available once a **Program** has been selected.
7. Your **Service/Activity Title**, **County-Assigned Objectives**, **CSAP Strategy**, **Service Delivered**, and **Primary IOM Category** will be filled in according to what you specified in the Identify Recurring Services/Activities screen.



(This is a screenshot displaying the Recurring Services Activities Edit Page. This is a partial screenshot.)

8. The **Group Series Status*** automatically defaults to ***Active***.
    a. ***Active***: The service/activity is currently in use.
    b. ***Cancelled***: The service/activity has been cancelled or is no longer in use.
    c. ***Completed***: The service/activity has been completed.
9. Enter the date of the event from the **Service Date*** field as mm/dd/yyyy.
10. Select the **Duration of Service/Activity*** by entering an amount in ***hours*** field and selecting any ***minutes*** from the dropdown list.
    *Notes: You may leave a zero in one of the fields, but at least one of the fields must have an amount higher than zero.
11. Select from the dropdown list the **Service/Activity Location*** where this event took place.

(This is a screenshot displaying the Recurring Services Activities Edit Page.)

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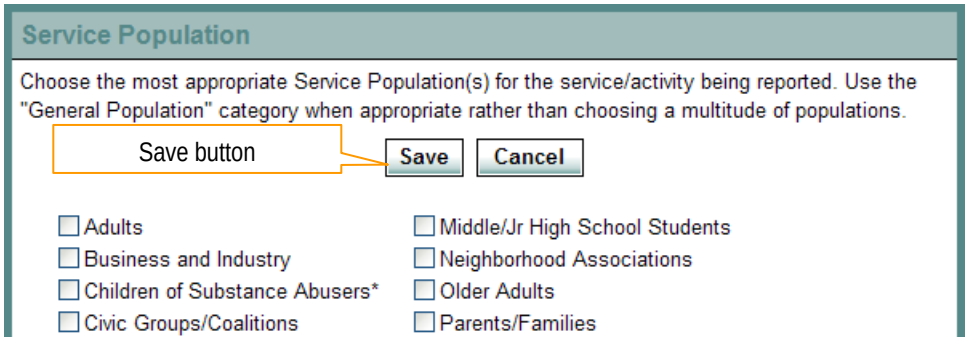
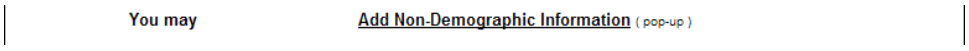
12. Enter the **Service Population*** by clicking the **Add Service Population** link. A new screen will appear displaying the Service Population screen.

    a. Select the population(s) you wish to add to this event by checking the box next to the population name.
       *Note: If all populations need added, select "General Population" from the list.
       i. To remove a population, uncheck the population name.
    b. Click **Save**. If you do not want to save any changes, click **Cancel**.
    c. The Service Population screen will close and you are returned to the Report Recurring Services/Activities screen.



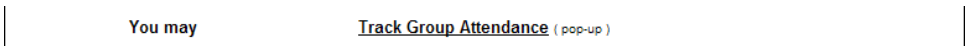
(This is a screenshot displaying the Service Population Page. This is a partial screenshot.)

13. You may add non-demographic information to this event by clicking the **Add Non-Demographic Information** link.
    *Note: For detailed information on entering in Non-Demographic Information, see Adding Demographic and/or Non-Demographic Services.



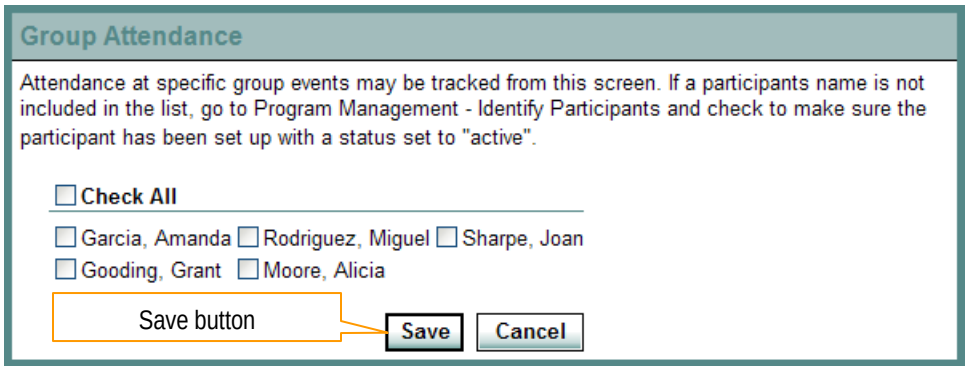
(This is a screenshot displaying the Recurring Services Activities Edit Page.)

14. For groups with individual participants: If you wish to add Attendance to the event, click the **Track Group Attendance** link. A new screen will appear displaying the Group Attendance screen.
    *Note: If the group was set up as a "Summary Group", the **Track Group Attendance** link will not be available.



(This is a screenshot displaying the Recurring Services Activities Edit Page.)

    a. Select the participant(s) you wish to add to this event by checking the box next to the participant name.
       *Note: If all populations need added, clicking the **Check All** selection will check all of the population names.
       i. To remove a participant, uncheck the participant name.
    b. Click **Save**. If you do not want to save any changes, click **Cancel**.
    c. The Group Attendance screen will close and you are returned to the Report Recurring Services/Activities screen.



(This is a sample screenshot displaying the Group Attendance Page.)

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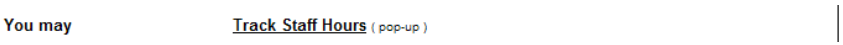
15. For groups with group summary demographics: If you wish to add a count of the number of attendees at the event, enter the number in the **Group Attendance** field.

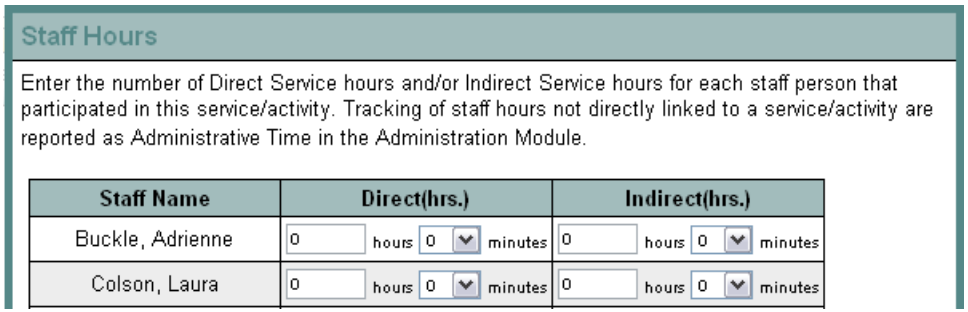
(This is a screenshot displaying the Recurring Services Activities Edit Page.)

16. Click the **Track Staff Hours** link to enter Staff time. A new screen will appear displaying the Staff Hours screen.



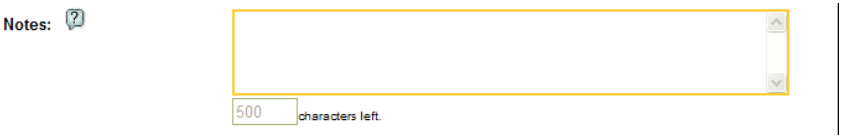
(This is a screenshot displaying the Recurring Services Activities Edit Page.)

    a. Select the number of **Direct (hrs.)** and/or **Indirect (hrs.)** next to the staff member(s) who worked on or delivered the event by entering an amount in *hours* field and selecting any *minutes* from the dropdown list.
    *Note: You may track staff time for more than one staff member who was present at the event.
        i. **Direct (hrs.)**: time spent face-to-face at the event
        ii. **Indirect (hrs.)**: time spent on preparing and/or performing follow-up duties for the event – any support time associated with the event
    b. Click **Save**. If you do not want to save any changes, click **Cancel**.
    c. The Staff Hours screen will close and you are returned to the Report Recurring Services/Activities screen.



(This is a sample screenshot displaying the Staff Hours Page. This is a partial screenshot.)

17. Enter a description of the event in the **Notes*** field.
18. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a screenshot displaying the Recurring Services Activities Edit Page.)

Tips

- From the report single service listing page, if you click on the program name, you can go directly to the program description form.
- If adding an event to an existing Group Series, click the **Add New Event** link next to the appropriate Program/Group series.
- After entering the sixth service in a series, a message will ask if you want to update the group demographics. Click **OK** to update the demographics of the original group or click **Cancel** if no updates are needed.

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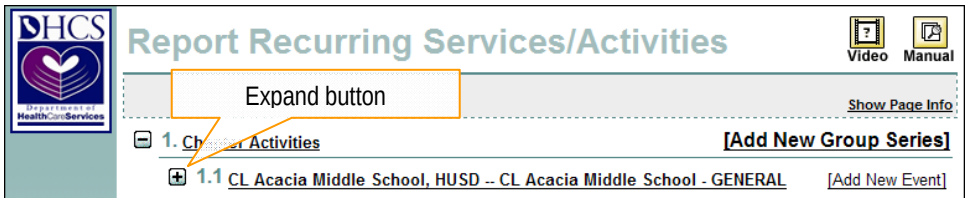
Editing Recurring Services



(This is a sample screenshot displaying the Report Recurring Services Activities Listing Page. This is a partial screenshot.)

1. Click **Implementation** from the main menu.
2. Click **Recurring Services Management** from the submenu.
3. Click **Report Recurring Services** from the category list.
4. From the Listing page, click the ⊞ next to the Service/Activity Title to display the Program-Group pairs associated with the title.
   *Note: Once the Program-Group pair are in view, the ⊞ becomes a ⊟.
5. Once the Program-Group pairs are available, click the ⊞ to display all events associated with that Program-Group pair.
6. Click on the service link (date) to open the event that you wish to edit.
7. The services will appear in the edit mode.
8. Make any changes needed to the form.
   a. Status
      i. *Active*: the series of events is currently in use.
      ii. *Completed*: the series of events has been completed.
      iii. *Cancelled*: the series of events are no longer in use.
9. Click **Save**. If you do not want to save any changes, click **Cancel**.

Deleting Recurring Services

1. Click **Implementation** from the main menu.
2. Click **Recurring Services Management** from the submenu.
3. Click **Report Recurring Services** from the category list.
4. From the Listing page, click the ⊞ next to the Service/Activity Title to display the Program-Group pairs associated with the title.
   *Note: Once the groups are in view, the ⊞ becomes a ⊟.
5. Once the Program-Group pairs are available, click the ⊞ to display all events associated with that Program-Group pair.
6. Click on the service link (date) to open the event that you wish to delete.
7. The services will appear in the edit mode.
8. Click **Delete** from the left toolbar.
9. Click **OK** when asked "Are you sure?". If you do not want to delete this program, click **Cancel**.

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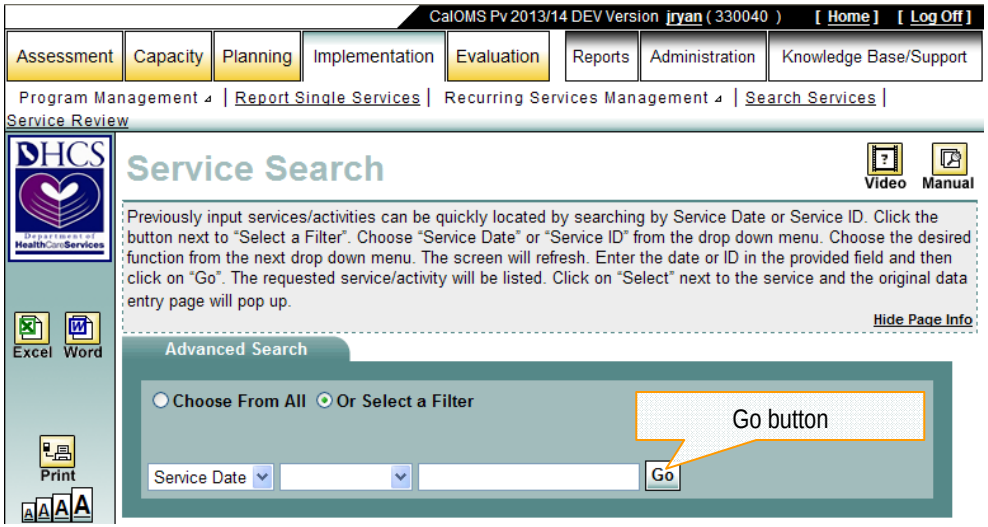
Search Services

Previously input services/activities can be quickly located by searching by Service Date or Service ID.

1. Click **Implementation** from the main menu.
2. Click **Search Services** from the submenu.
3. Click the ○ **Choose From All** (**Choose From All**) radio button to see a list of all data that has been entered.
4. The ⊙ **Or Select a Filter** (**Or Select a Filter**) option allows you to limit search results. To change the search filters, first click the ⊙ **Or Select a Filter** radio button. Then select an option from the three search filter fields. Once the three search filter fields have been selected, click the Go (**Go**) button to see the search results.
5. The three search filter fields are used in the following methods:
    a. Select *Service Date* or *Service ID* from the dropdown list.
    b. The second search filter allows you to specify how you wish to search.
    c. The third search filter is the search criteria. This field will change based on the second search filter selected.



(This is a screenshot displaying the Search Services Page.)

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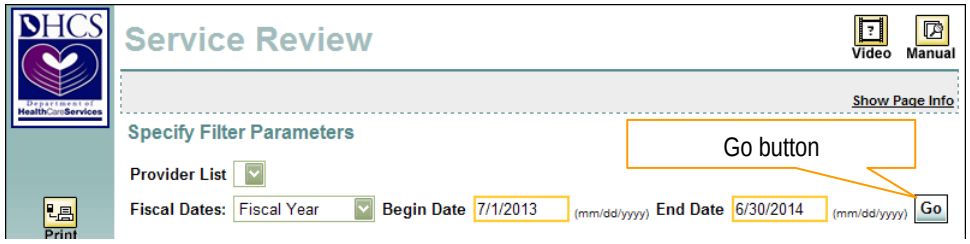
Service Review

Only the county is able to view the Service Review module.

1. Click **Implementation** from the main menu.
2. Click **Service Review** from the submenu.
3. Select the appropriate provider from the **Provider List** dropdown.
4. To select a specific date range:
    a. Select the **Fiscal Dates** from the dropdown list to fill in the **Begin Date** and **End Date** fields with the beginning date and ending date of the selected time period.

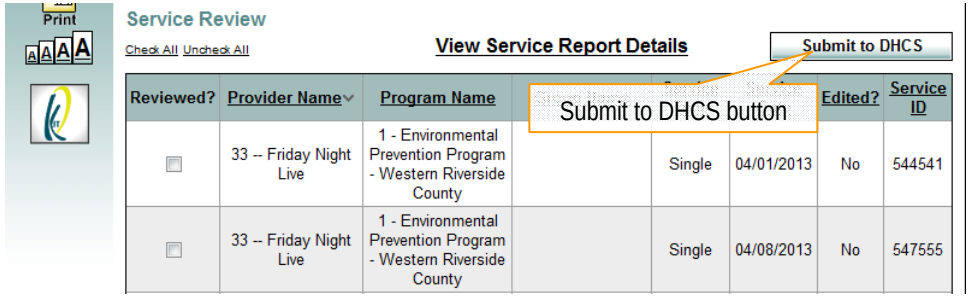
    Or

    b. Enter the specific dates into the **Begin Date** and **End Date** fields as mm/dd/yyyy.
5. Click the Go (Go) button.



(This is a screenshot displaying the Service Review Edit Page.)

6. All non-reviewed services will appear.
7. To indicate that all the service/activity data has been reviewed, check the box next to the **Check All Services** field.
8. To indicate that only selected service/activity data has been reviewed, select the box next to the individual service in the list.
9. Click the Submit to DHCS (Submit to DHCS) button. DHCS will now be able to view the service/activity data and run reports.



(This is a sample screenshot displaying the Service Review Edit Page. This is a partial screenshot.)

Tips

- To view detailed information for each service/activity, click on the link entitled View Service Report Details. A new screen will pop up with a report reflecting the details.

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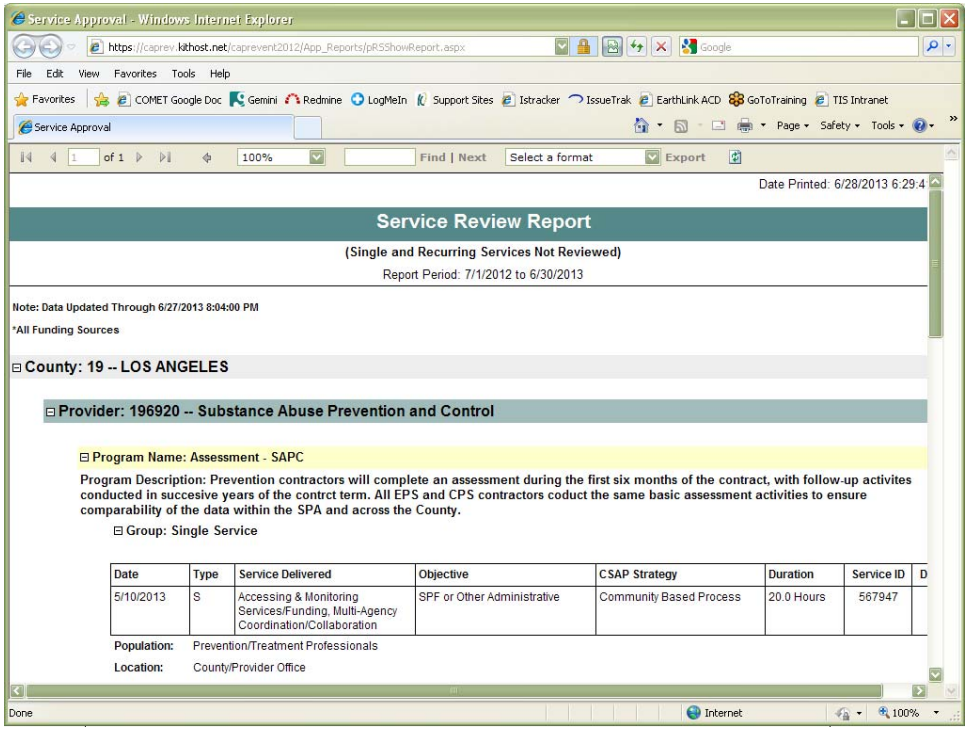
View Service Report Details

1. Click on the ⊞ under the 'Detail' column to view the event description and more details on the Demographic and Non-Demographic Service(s).
2. To print the report, click the (**print**) button located at the top of the screen.



(This is a sample screenshot displaying the Service Review Report. This is a partial screenshot.)

Tips

- To view a report on services that have been submitted to DHCS, click **Reports** from the main menu. Click **Standard Reports** from the submenu. Click the **Implementation** tab and select to view the ***Service Review Report***. On the next screen, it is required to select data before clicking the **Show Report** button. From the **Review Status** dropdown list, select ***Reviewed***. This will show you a report of only those services that have been reviewed. Click the **Show Report** button to open the report.

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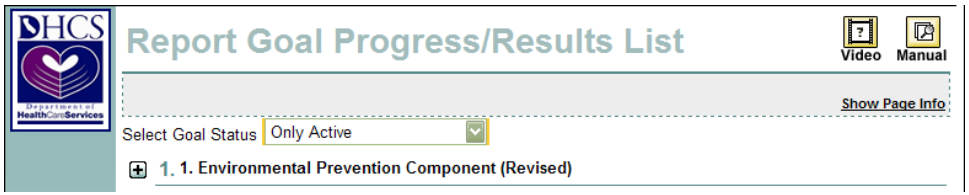
EVALUATION

The Evaluation module is used to monitor, evaluate, sustain and improve goals and objectives or replace those that fail.

Report Goal Progress/Results

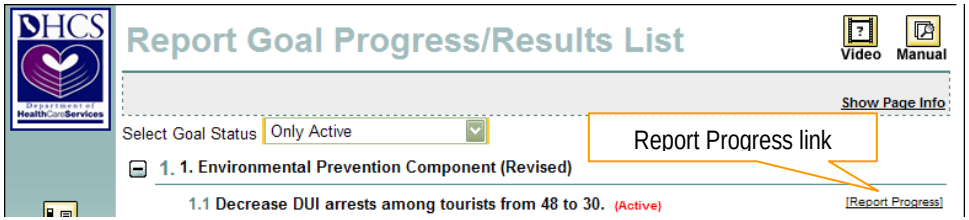
This module is used to report progress on meeting goals.

1. Click **Evaluation** from the main menu.
2. Click **Report Goal Progress/Results** from the submenu.
3. Choose 'All', 'Only Active', or 'Only Cancelled or Completed' from the filter drop down to help find the desired Progress Report



(Use the Goal Status filter to help you find a progress report.)

4. From the Listing page, click the ⊞ next to the appropriate Problem Statement to display the Goals associated with the Problem Statement.
   *Note: Once the goals are in view, the ⊞ becomes a ⊟.
5. To report progress made for a Goal, click **[Report Progress]** to the right of the appropriate Goal.



(This is a sample screenshot displaying the Report Goal Progress Page. This is a partial screenshot.)

6. The **Status*** is defaulted to *Active*.
7. Enter the **Progress Report Period*** in the **Begin Date** and **End Date** fields as mm/dd/yyyy.

(This is a sample screenshot displaying the Report Goal Progress Page.)

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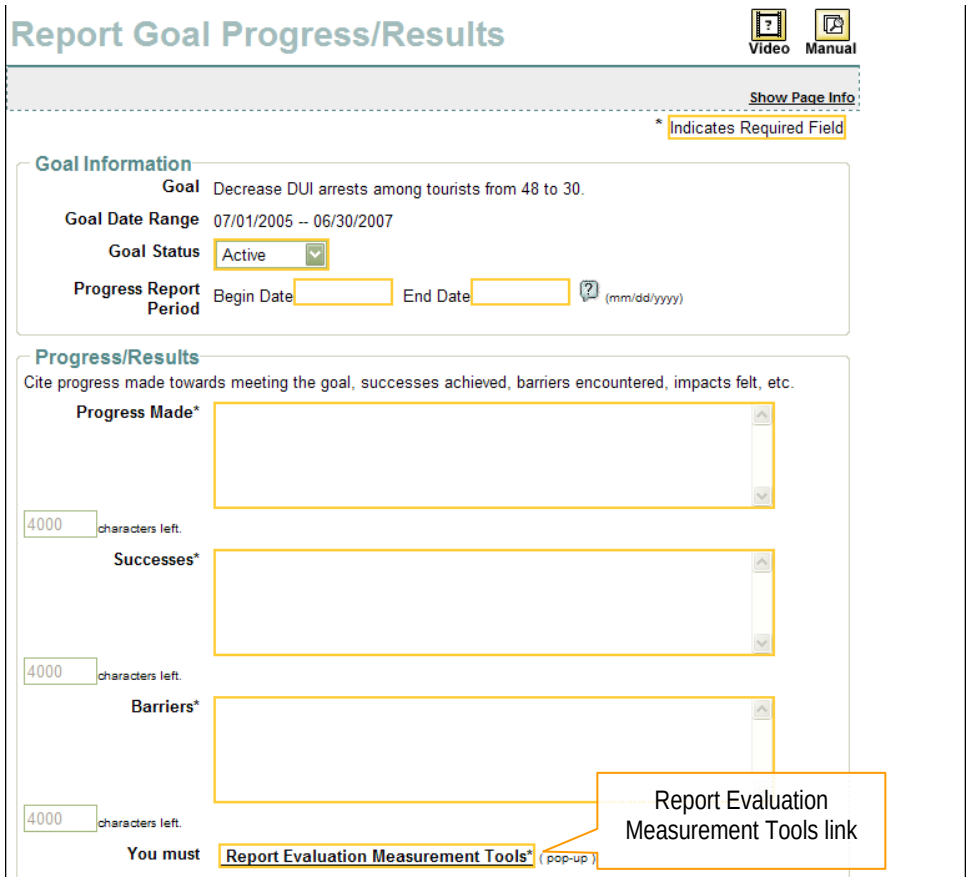
8. Enter any progress made in the **Progress Made*** field.
9. Enter any successes achieved in the **Successes*** field.
10. Enter any barriers encountered in the **Barriers*** field.
11. Enter the evaluation measurement tools used by clicking the **Report Evaluation Measurement Tools*** link. A new screen will appear displaying the Assessment/Evaluation Tools screen.



a. Select the assessment tool(s) that was used to evaluate the goal by checking the box next to the assessment tool name.
    i. To remove an assessment tool, uncheck the assessment tool name.
b. A box will appear asking for details regarding that assessment tool. Enter the appropriate information in the box.
c. Click **Save**. If you do not want to save any changes, click **Cancel**.
d. The Assessment/Evaluation Tools screen will close and you are returned to the Report Goal Progress/Results screen.

(This is a screenshot displaying the Evaluation Measurement Tools Page. This is a partial screenshot.)

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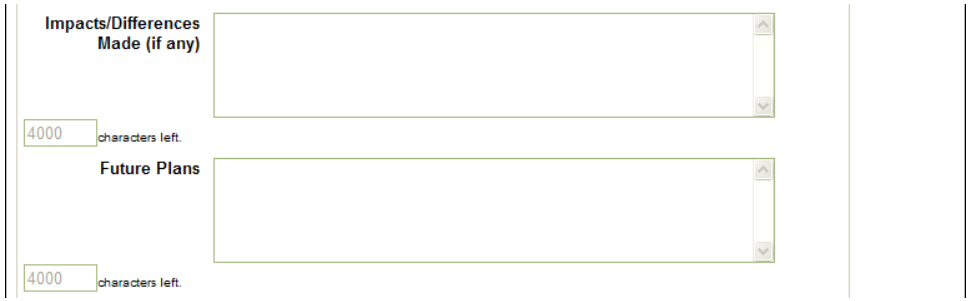
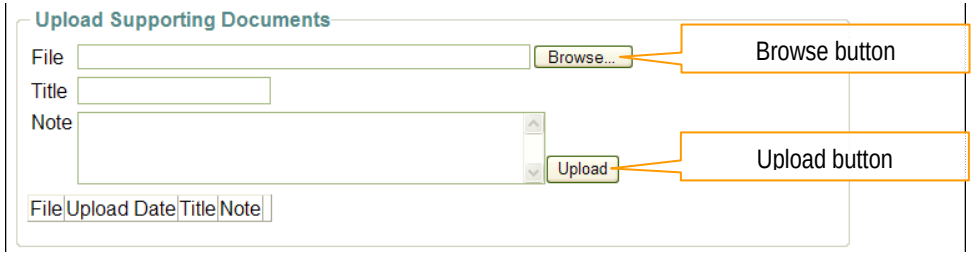
12. If applicable, enter any impacts felt in the **Impacts/Differences Made (if any)** field.
13. If applicable, enter any future plans in the **Future Plans** field.



(This is a screenshot displaying the Report Goal Progress Page.)

14. You have an opportunity to upload a supporting document that may be associated with this goal's progress/result.
    a. Click the Browse... button to search for the document you wish to insert.
    b. Click the **Upload** button to add the document to the meeting. Click **Cancel** if you do not wish to insert a document.
    c. The document will be uploaded to the service. Click on the **link** to open the document.

    *Note: The link will be displayed similar to agenda.pdf.
15. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a screenshot displaying the Report Goal Progress Page.)

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Editing Goal Progress/Results

1. Click **Evaluation** from the main menu.
2. Click **Report Goal Progress/Results** from the submenu.
3. From the Listing page, click the ⊞ next to the Problem Statement to display the Goals associated with the Problem Statement.
   *Note: Once the goals are in view, the ⊞ becomes a ⊟.
4. Once the Goals are available, click the ⊞ to display all progress dates associated with that Goal.
5. Click on the progress date link to open the progress results that you wish to edit.
6. The results will appear in the edit mode.
7. Make any changes needed to the form.
   a. Status
      i. *Active*: the goal is currently in use.
      ii. *Completed*: the goal has been completed.
      iii. *Cancelled*: the goal has been cancelled and no longer used.
      *Note: If *Completed* or *Cancelled* was selected, a new field will appear for you to enter the date that the goal was completed/cancelled.
8. Click **Save**. If you do not want to save any changes, click **Cancel**.

Deleting Goal Progress/Results

1. Click **Evaluation** from the main menu.
2. Click **Report Goal Progress/Results** from the submenu.
3. From the Listing page, click the ⊞ next to the Problem Statement to display the Goals associated with the Problem Statement.
   *Note: Once the goals are in view, the ⊞ becomes a ⊟.
4. Once the Goals are available, click the ⊞ to display all progress dates associated with that Goal.
5. Click on the progress date link to open the progress results that you wish to delete.
6. The results will appear in the edit mode.
7. Click **Delete** from the left toolbar.
8. Click **OK** when asked "Are you sure?". If you do not want to delete this program, click **Cancel**.

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Report Objectives Progress/Results

This module is used to report progress on meeting objectives.

1. Click **Evaluation** from the main menu.
2. Click **Report Objective Progress/Results** from the submenu.
3. From the Listing page, click the ⊞ next to the appropriate Goal to display the Objectives associated with the Goal.
   *Note: Once the objectives are in view, the ⊞ becomes a ⊟.
4. To report progress made for an Objective, click **[Report Progress]** to the right of the appropriate Objective.

(This is a sample screenshot displaying the Report Objectives Progress Listing Page. This is a partial screenshot.)

5. The **Status*** is defaulted to *Active*.
6. Enter the **Progress Report Period*** in the **Begin Date** and **End Date** fields as mm/dd/yyyy.

(This is a sample screenshot displaying the Report Objectives Progress Page.)

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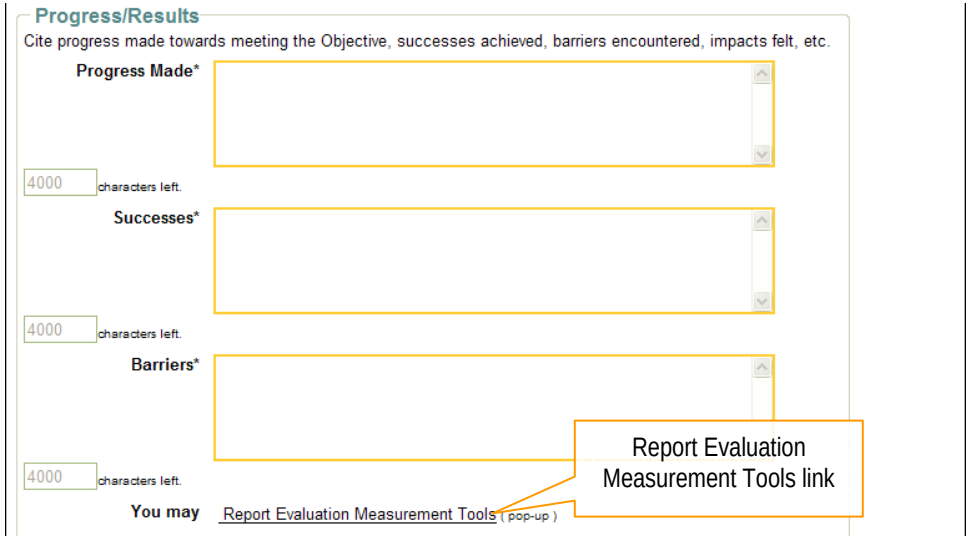
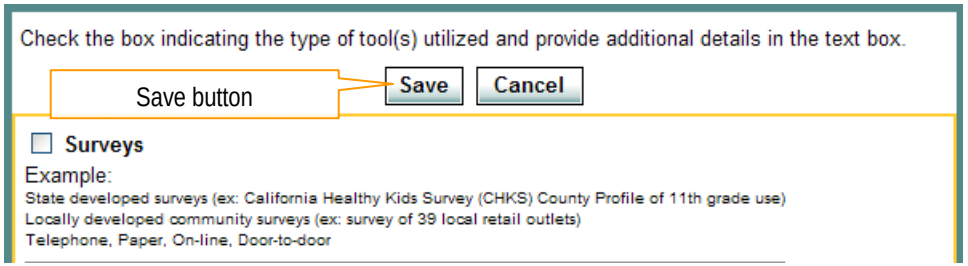
7. Enter any progress made in the **Progress Made*** field.
8. Enter any successes achieved in the **Successes*** field.
9. Enter any barriers encountered in the **Barriers*** field.
10. If applicable, enter the evaluation measurement tools used by clicking the **Report Evaluation Measurement Tools*** link. A new screen will appear displaying the Assessment/Evaluation Tools screen.



a. Select the assessment tool(s) that was used to evaluate the goal by checking the box next to the assessment tool name.
    i. To remove an assessment tool, uncheck the assessment tool name.
b. A box will appear asking for details regarding that assessment tool. Enter the appropriate information in the box.
c. Click **Save**. If you do not want to save any changes, click **Cancel**.
d. The Assessment/Evaluation Tools screen will close and you are returned to the Report Goal Progress/Results screen.



(This is a screenshot displaying the Evaluation Measurement Tools Page. This is a partial screenshot.)

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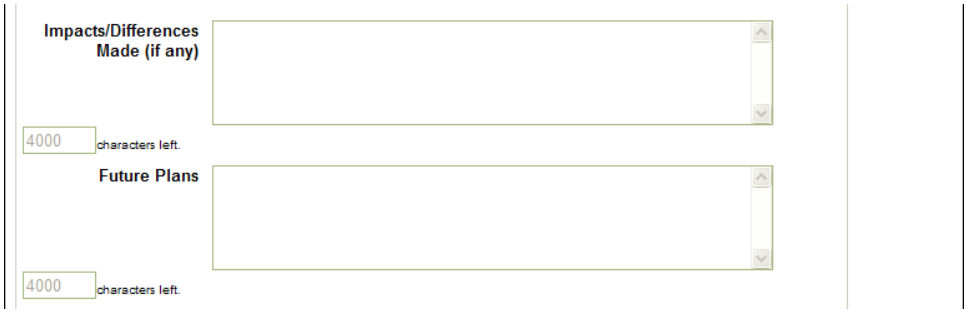
11. If applicable, enter any impacts felt in the **Impacts/Differences Made (if any)** field.
12. If applicable, enter any future plans in the **Future Plans** field.



(This is a screenshot displaying the Report Objectives Progress Page.)

13. You have an opportunity to upload a supporting document that may be associated with this goal's progress/result.
    a. Click the Browse... button to search for the document you wish to insert.
    b. Click the Upload button to add the document to the meeting. Click Cancel if you do not wish to insert a document.
    c. The document will be uploaded to the service. Click on the **link** to open the document.
    *Note: The link will be displayed similar to agenda.pdf.
14. Click **Save**. If you do not want to save any changes, click **Cancel**.

(This is a screenshot displaying the Report Objectives Progress Page.)

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Editing Objective Progress/Results

1. Click **Evaluation** from the main menu.
2. Click **Report Objective Progress/Results** from the submenu.
3. From the Listing page, click the ⊞ next to the appropriate Goal to display the Objectives associated with the Goal.
   *Note: Once the objective are in view, the ⊞ becomes a ⊟.
4. Once the Objectives are available, click the ⊞ to display all progress dates associated with that Objective.
5. Click on the progress date link to open the progress results that you wish to edit.
6. The results will appear in the edit mode.
7. Make any changes needed to the form.
   a. Status*
      i. *Active*: the objective is currently in use.
      ii. *Completed*: the objective has been completed.
      iii. *Cancelled*: the objective has been cancelled and no longer used.
      *Note: If *Completed* or *Cancelled* was selected, a new field will appear for you to enter the date that the objective was completed/cancelled.
8. Click **Save**. If you do not want to save any changes, click **Cancel**.

Deleting Objective Progress/Results

1. Click **Evaluation** from the main menu.
2. Click **Report Objective Progress/Results** from the submenu.
3. From the Listing page, click the ⊞ next to the appropriate Goal to display the Objectives associated with the Goal.
   *Note: Once the objective are in view, the ⊞ becomes a ⊟.
4. Once the Objectives are available, click the ⊞ to display all progress dates associated with that Objective.
5. Click on the progress date link to open the progress results that you wish to delete.
6. The results will appear in the edit mode.
7. Click **Delete** from the left toolbar.
8. Click **OK** when asked "Are you sure?". If you do not want to delete this program, click **Cancel**.

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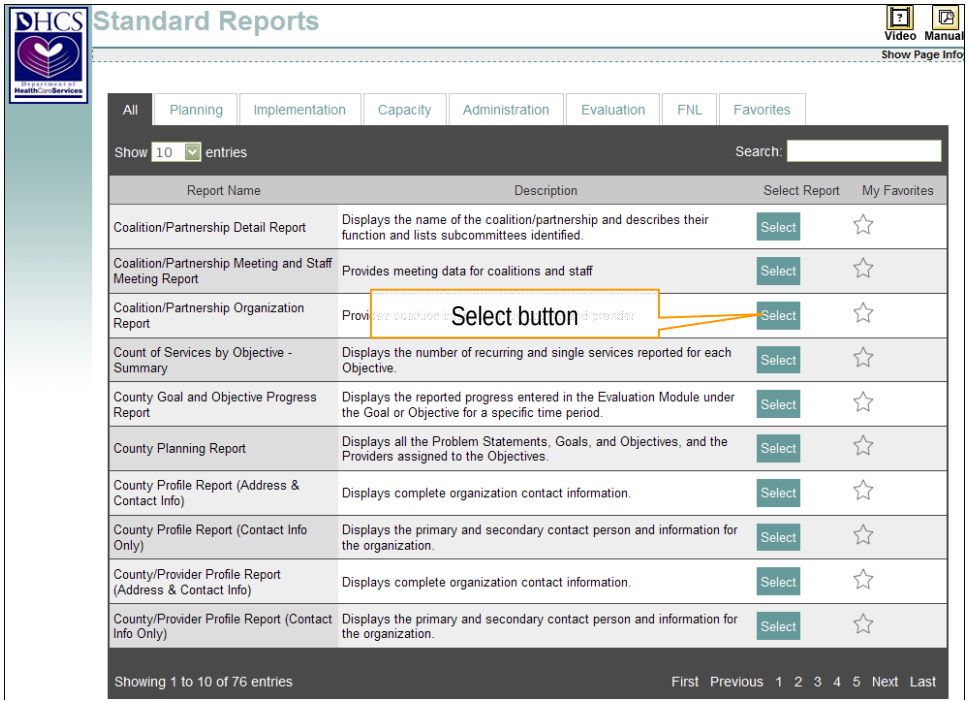
REPORTS

The Reports section allows you to select reports by fiscal year: **Reports 13/14**, **Reports 12/13** and **Reports 06/07 – 11/12**. Once the Fiscal Year(s) is selected, you can select from the three subcategories: Standard Reports, Report Builder, or Data Export.

Standard Reports

Opening a Standard Report

1. Click **Reports** from the main menu.
2. Click on the ⊞ (**Expand**) button of the fiscal year(s) reports desired.
3. Click **Standard Reports** from the category list.
   *Note: If you selected Reports 06/07 – 11/12, see the Opening a Standard Report for Previous Fiscal Years section.
4. The Reports Listing page defaults to a list of all available reports. To locate a report specific to a module within CalOMS Pv, select the type of report you wish to view/print from the tabs (i.e. **Planning**, **Implementation**, **Capacity**, **Administration**, **Evaluation**, **FNL** or **Favorites**).
5. Select the report you wish to view/print by clicking the Select (**Select**) button.
6. If applicable, select any report parameters.
7. Click the Show Report (**Show Report**) button to bring up a separate window with the report.



(This is a screenshot displaying the Reports 13/14 Listing Page.)

Tips

- To return to the list of reports, click on the entitled tab. Then follow the instructions for opening a report.
- If you have a pop-up blocker on your computer, hold the **Ctrl** key down while selecting any button used to view the report (e.g., Show Report, PDF, etc.).
- To create a list of your frequently used reports, select the ☆ (star) in the My Favorites column to the right of these reports. Click on the **Favorites** tab to go to this list.
- By default, the grid will display up to ten records per page. You can change this number by using the **Show entries** dropdown list. Show 10 entries
- To move between the various pages, use the buttons at the bottom of the grid. If there are less than ten records listed, the buttons will not be active. First Previous 1 2 3 4 5 Next Last

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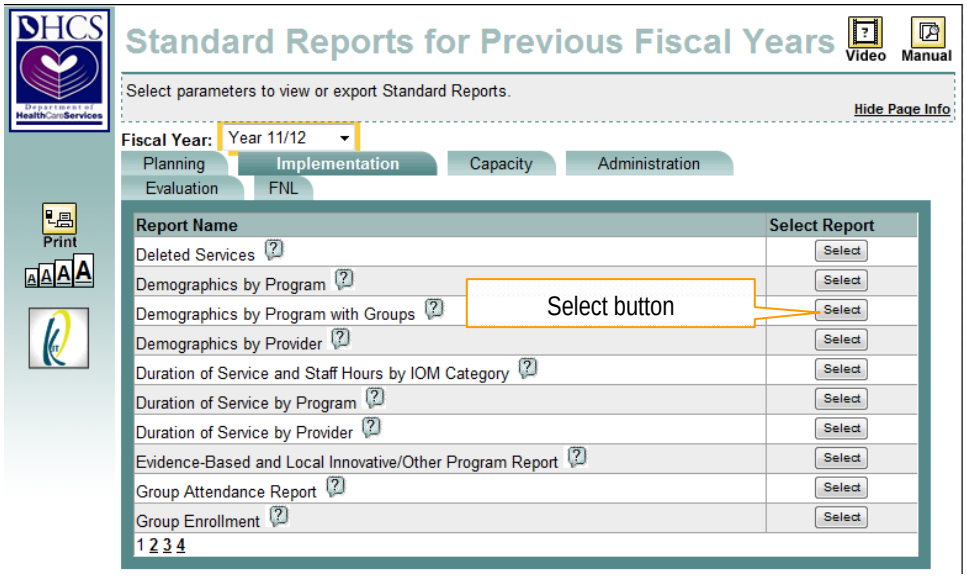
- If you have many entries listed, enter a word or phrase that is part of the Report name or Description in the **Search** field to find that report. Search:

Opening a Standard Report for Previous Fiscal Years

1. Click **Reports** from the main menu.
2. Click **Reports 06/07 – 11/12** from the submenu.
3. Click **Standard Reports** from the category list.
4. Select the fiscal year you would like to view from the **Fiscal Year** dropdown list.
5. Select the type of report you wish to view/print from the tabs (i.e. **Planning**, **Implementation**, **Capacity**, **Administration**, **Evaluation**, and/or **FNL**).
6. Select the report you wish to view/print by clicking the Select (**Select**) button.
7. If applicable, select any report parameters.
8. Click the Show Report (**Show Report**) button to bring up a separate window with the report.



(This is a screenshot displaying the Standard Reports for Previous FY Listing Page.)

Tips

- To return to the list of reports, click on the entitled tab. Then follow the instructions for opening a report.
- If you have a pop-up blocker on your computer, hold the **Ctrl** key down while selecting any button used to view the report (e.g., Show Report, PDF, etc.).
- By default, the grid will display up to ten records per page. To move between the various pages, use the numbers at the bottom of the grid. If there are less than ten records listed, the buttons will not be active. 1 2 3 4

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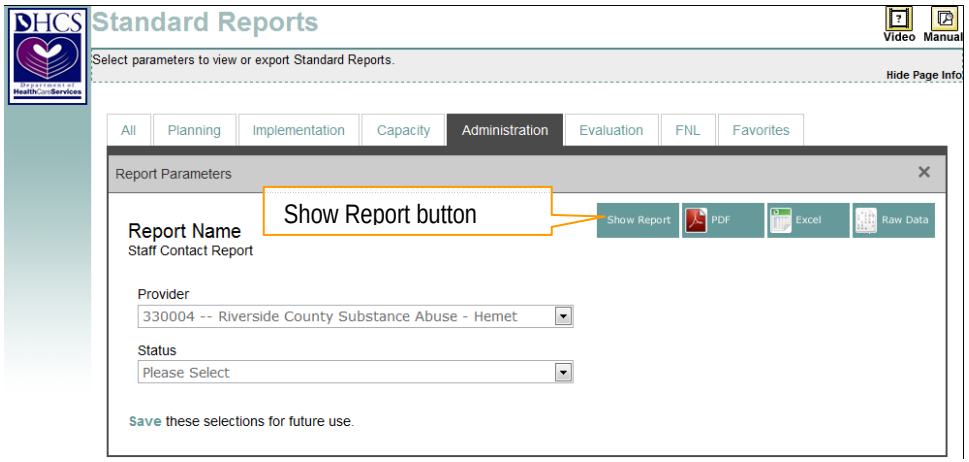
Using Reports that Require Additional Data

Some reports will load immediately when the Show Report (Show Report) button is clicked on. Others require additional information to be entered first, such as a data range.

1. Select the appropriate data from each of the required dropdown lists.
2. To select a specific date range:
    a. Select the Time Period from the dropdown list to fill in the Begin Date and End Date fields with the beginning date and ending date of the selected time period.

    Or

    b. Enter the specific dates into the Begin Date and End Date fields as mm/dd/yyyy.
3. Click the Show Report (Show Report) button to bring up a separate window with the report.
    a. If you do not want to first view the report onscreen (and follow the instructions in the next section on printing or saving the report), you may select one of the common formats for reports (PDF or Excel). Clicking on one of these icons will download the report immediately in this format.
    b. Another option is choosing RAW DATA icon. Clicking this icon will download the report in Excel format, but not in aggregate (or summary) form. It will load each detail record used to produce the aggregate or summary report.



(This is a screenshot displaying the Reports 13/14 Reports Parameters Page.)

Tips

- With the "*Save these selections for future use*" link at the bottom of the parameters page, your report options will be saved. When the Select (Select) button is clicked, you will no longer need to select all options – the previous options remain and may be kept or modified as you need. To update or clear the saved selections, the "Save" link will change to read "*Update or Clear*". If you modified your selections, click "*Update*". If you want to completely remove the selections, click "*Clear*". This link is only available for the 13/14 or 12/13 fiscal year Standard Reports.

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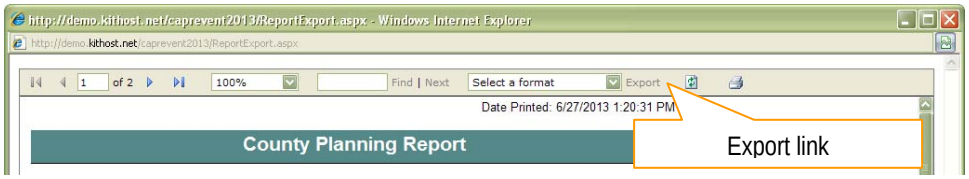
Printing or Saving Reports

Once you have clicked the Show Report (**Show Report**) button, you will then see a print preview screen. Use the following instructions to print or save the report:



1. Select a format from the **Select a format** dropdown list (located at the top center of the report).
2. Click **Export** (located next to the dropdown list).
3. The report will open in a new window in the Export format requested.
4. Click the print button or to print the report.
   *Note: You do not have to save the report to print.
5. Click the disk button or to save the report.

Tips

- The recommended format for printing is ***Acrobat (PDF) file***.
- If you have a pop-up blocker on your computer, hold the ctrl key down while selecting any button used to view the report (e.g., Show Report, PDF, etc.).
- Reports require Active X controls to be installed on your computer. If you do not have permissions to download, please contact your system administrator.
- Excel/PDF buttons were added to the Reports module to allow MAC users to view reports and for quick export of the "***Service Review***" report.

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Report Builder

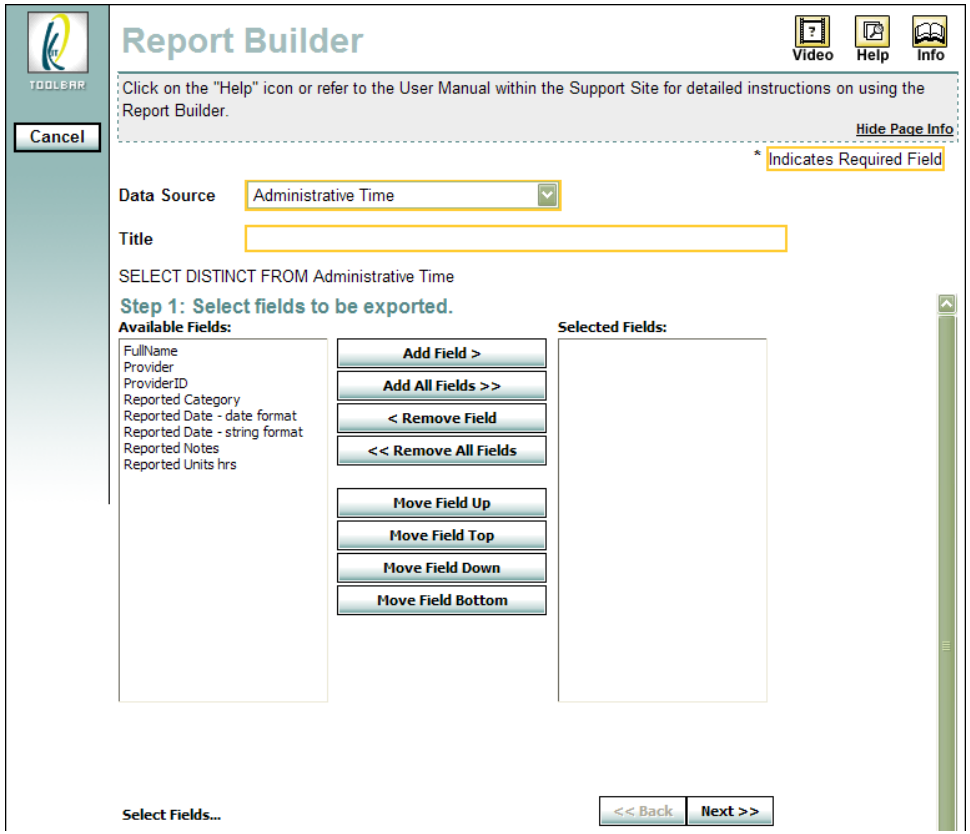
A county/provider is able to create and customize a report by using the Report Builder module.

1. Click **Reports** from the main menu.
2. Click on the ⊞ (Expand) button of the fiscal year(s) reports desired.
3. Click **Report Builder** from the submenu.
    a. If you selected Reports 06/07 – 11/12, use the **Fiscal Year** dropdown menu to select the appropriate Fiscal Year.
4. Click **Add** from the left toolbar.
5. Select a **Data Source** from the dropdown list.
6. Enter a short description of the report in the **Title** field.
7. Select the fields (columns) that you would like to add to your report from the **Available Fields** column by clicking on the field name and clicking the Add Field > button to move it to the **Selected Fields** column.

   *Note: If you would like to include all fields within your report, select the Add All Field >> button.
8. Once all of your chosen columns are in the **Selected Fields** column, you can put them in order of how they will be viewed in the report. Click on the field name and then use the following buttons to put your fields in order:

Move Field Up	Moves the field up one level.
Move Field Top	Moves the field to the top of the list.
Move Field Down	Moves the field down one level.
Move Field Bottom	Moves the field down to the end of the list.

9. Click the Next >> button.



(This is a screenshot displaying the Report Builder Page.)

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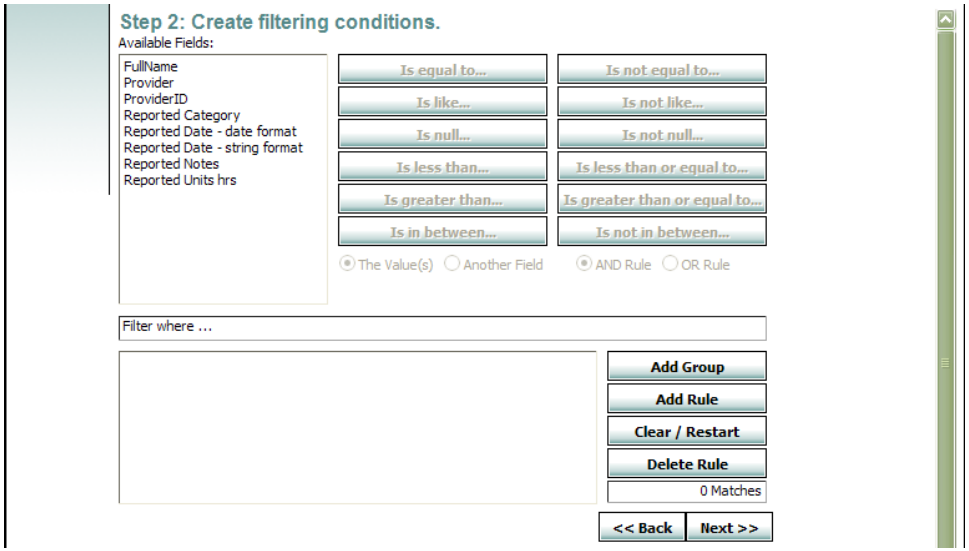
10. Create your rule by selecting a field from the **Available Fields** column.
11. Select either **AND Rule** or **OR Rule**.
12. Select one of the buttons to create your rule.

Is equal to...	Is the same as the information selected
Is not equal to...	Is not the same than the information selected
Is like...	Is similar to the information selected.
Is not like...	Is different than the information selected.
Is null...	View no information for this field.
Is not null...	View all information for this field.

13. A dropdown box or an empty field will appear depending on what box you selected above. Select or fill in the appropriate information.
14. Click the Add Rule button. Your rule will appear in the box.
    a. To reset your rule click the Clear / Restart button.
    b. To delete your rule click the Delete Rule button.
15. Click the Next >> button.



(This is a screenshot displaying the Report Builder Page.)

16. If you would like to sort by rows select your fields from the **Available Fields** column, use the buttons to move them into the **Selected Fields** column and to place them in the correct order, and select whether you would like the field in ascending or descending order.
17. Click the Finish button to have your report open in a Microsoft Excel spreadsheet.
18. Click **Save**. If you do not want to save any changes, click **Cancel**.

	A	B	C	D	E	F
1	Provider	ProviderID	Federal Category	Location	Objective	Program Name
2	Aldea	282822		School Site - Middle School	Increase enrollment in Friday Night Live among high-risk youth from 10% to 20%.	Club Live - Fir Middle School
3	Aldea	282822		School Site - Middle School	Increase enrollment in Friday Night Live among high-risk youth from 10% to 20%.	Club Live - Fir Middle School
4	Aldea	282822		School Site - Middle School	Increase enrollment in Friday Night Live among high-risk youth from 10% to 20%.	Club Live - Fir Middle School

(This is a sample screenshot displaying the Report. This is a partial screenshot.)

Tips

- You can only select one field at a time.
- You will only be able to filter a small amount of fields at a time.
- If your report does not appear after selecting the Finish button, hold the control key down while selecting the Finish button.

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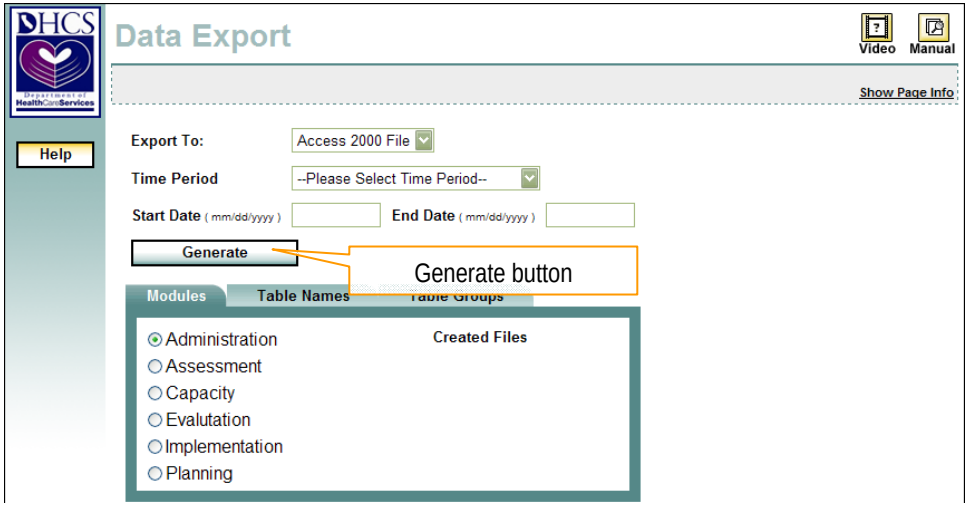
Data Export

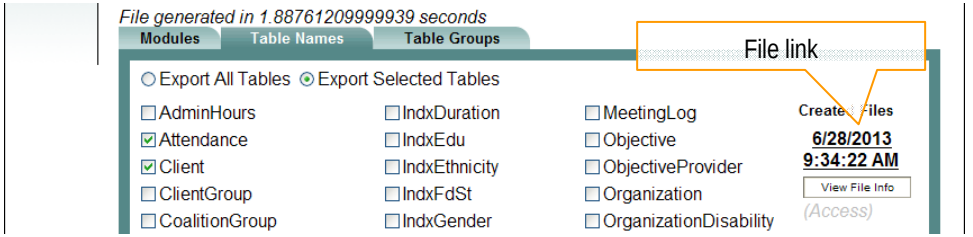
The Data Export Module allows users to export their CalOMS Prevention data in its raw form which will enable them to create customized evaluations based on desired criteria.

If you would like to export data, use the following steps:

1. Click **Report** from the main menu.
2. Click on the ⊞ (**Expand**) button of the fiscal year(s) reports desired.
3. Click **Data Export** from the submenu.
    a. If you selected Reports 06/07 – 11/12, use the **Fiscal Year** dropdown menu to select the appropriate Fiscal Year.
4. Select the program format from the **Export To** list: choose whether you want the data exported to a *Microsoft Access file* or an *Excel Spreadsheet*.
5. Select the current **Time Period**, or enter a **Start Date** and **End Date** as mm/dd/yyyy.
6. Choose either the **Modules**, **Table Names**, or **Table Groups** tab.
7. Select the data you want to export with the available check boxes.
8. Click the Generate (**Generate**) button.



(This is a screenshot displaying the Data Export Page.)



(This is a sample screenshot displaying the Data Export Page. This is a partial screenshot.)

9. Click the link under **Created Files** to export the data.
10. Choose whether you want to **Open** or **Save** the file.

Tips

- You will not be able to view "Staff" or "Client" information if you specified a particular Time Period. To view "Staff" or "Client" information, select ***All Data*** from the **Time Period** dropdown list.
- The recommended file export format is Access2000.
- Clicking the View File Info (**View File Info**) button will provide you a history of the exported file, including the date the file is generated and what is in the file.

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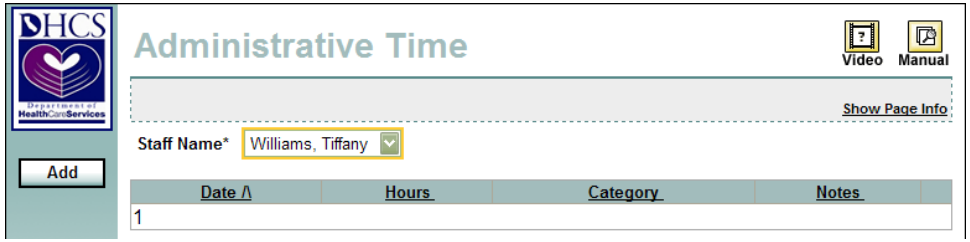
Administrative Time

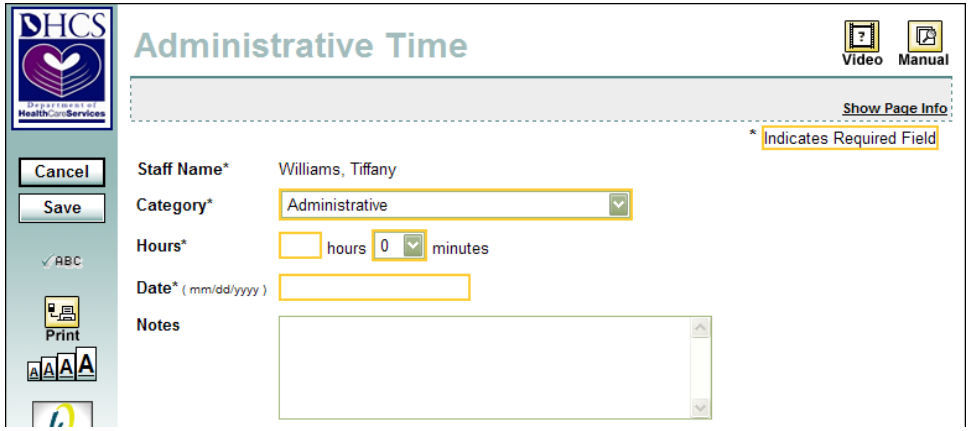
The Administrative Time area allows users to indicate time spent on prevention that is not directly related to a service. Time spent during trainings, meetings, general planning, or even entering information into CalOMS Prevention can be classified as administrative time. To enter administrative time into CalOMS Prevention, use the following method:

1. Click **Administrative** from the main menu.
2. Click **Administrative Time** from the submenu.
3. Select a staff member from the **Staff Name*** dropdown list.
4. Click **Add** from the left toolbar.



(This is a sample screenshot displaying the Administrative Time Listing Page.)

5. Select the **Category*** from the dropdown list.
6. Enter the **Hours*** by entering an amount in *hours* field and selecting any *minutes* from the dropdown list.
   *Notes: You may leave a zero in one of the fields, but at least one of the fields must have an amount higher than zero.
7. Fill in the **Date*** as mm/dd/yyyy.
8. Type in any additional information regarding this time in the **Notes** field.
9. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Administrative Time Page.)

Tips

- Administrative Time is for county/provider use only and is optional. Only the entity entering the information will be able to view it.

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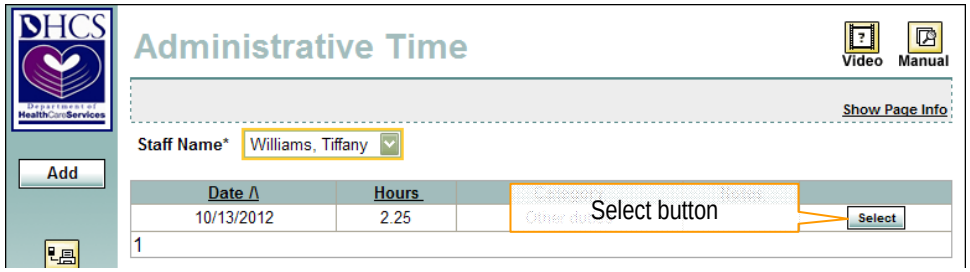
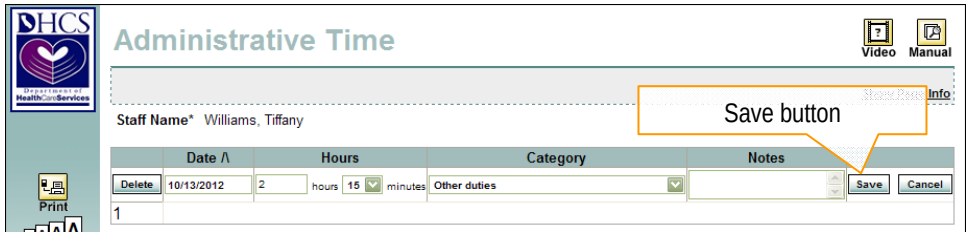
Editing Administrative Time

1. Click **Administrative** from the main menu.
2. Click **Administrative Time** from the submenu.
3. Select a staff member from the **Staff Name** dropdown list.
4. Click the Select button to the right of the date you wish to edit.



(This is a sample screenshot displaying the Administrative Time Listing Page.)

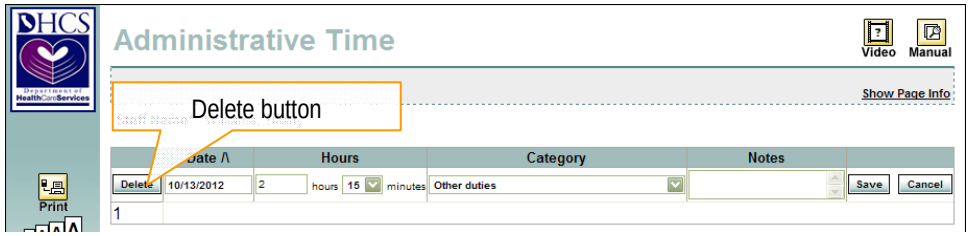
5. The **Administrative Time** will appear in the edit mode.
6. Make any changes needed to the form.
7. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Administrative Time Listing Page.)

Deleting Administrative Time

1. Click **Administrative** from the main menu.
2. Click **Administrative Time** from the submenu.
3. Select a staff member from the **Staff Name** dropdown list.
4. Click the Select button to the right of the date you wish to delete.
5. The **Administrative Time** will appear in the edit mode.
6. Click the **Delete** button.
7. Click **OK** when asked "Are you sure?". If you do not want to delete the administrative time, click **Cancel**.



(This is a sample screenshot displaying the Administrative Time Listing Page.)

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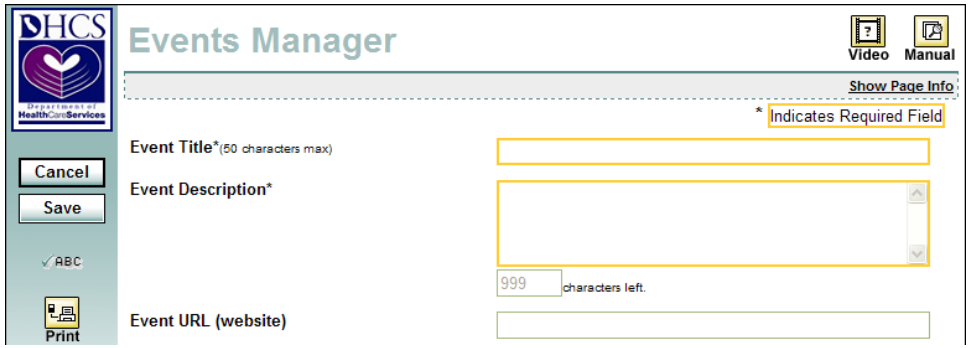
Events Manager

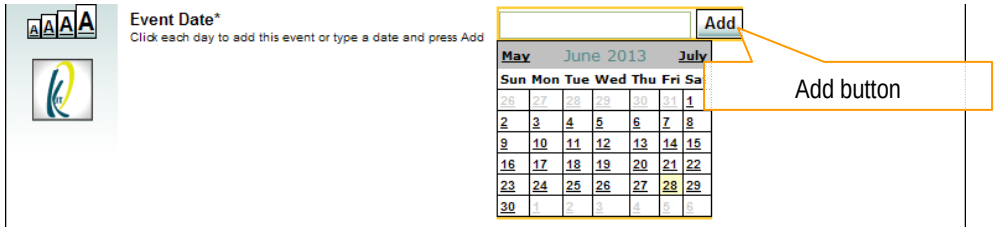
The Events Manager allows you to enter events into the Calendar to be viewed on the Home page. Only prevention related events should be placed on the Calendar.

1. Click **Administrative** from the main menu.
2. Click **Events Manager** from the submenu.
3. Click **Add** from the left toolbar.
4. Enter the title to be displayed on the Calendar in the **Event Title*** field.
5. Enter the description of the event in the **Event Description*** field.
6. If there is a website associated with the event, you may enter it in the **Event URL** field.



(This is a screenshot displaying the Events Manager Page.)

7. Select the **Event Date** from the Calendar by clicking on the day(s) the event is to take place or you can enter a date into the **Event Date** field as mm/dd/yyyy. Then click the Add (**Add**) button.



(This is a screenshot displaying the Events Manager Page.)

   a. If more than one day was selected for the event, each day selected will display.
   b. Click the link entitled Remove to remove one of the dates.

(This is a sample screenshot displaying the Events Manager Page.)

8. Click **Save**. If you do not want to save any changes, click **Cancel**.

Tips

- Events entered by DHCS can be viewed by all users. Events entered at the county level can only be viewed by the county entering the information and their providers. Events entered at the provider level can only be viewed by the provider.

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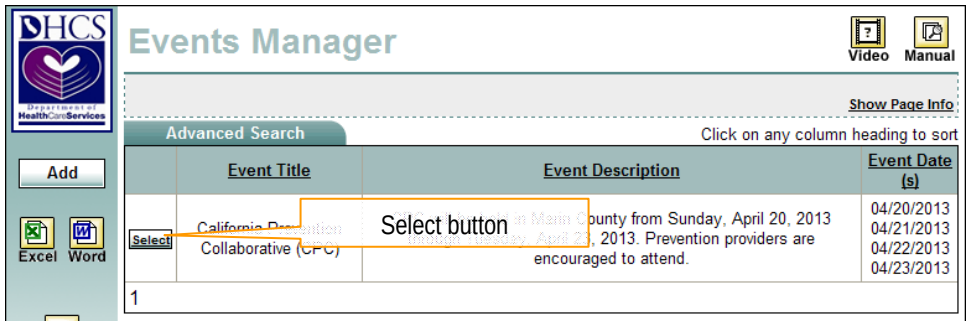
Editing an Event

1. Click **Administrative** from the main menu.
2. Click **Events Manager** from the submenu.
3. Click the Select (**Select**) button next to the event you wish to edit.
4. The Event will appear in the edit mode.
5. Make any changes needed to the form.
6. Click **Save**. If you do not want to save any changes, click **Cancel**.



(This is a sample screenshot displaying the Events Manager Listing Page.)

Deleting an Event

1. Click **Administrative** from the main menu.
2. Click **Events Manager** from the submenu.
3. Click the Select (**Select**) button next to the event you wish to edit.
4. The Event will appear in the edit mode.
5. Click the **Delete** button.
6. Click **OK** when asked "Are you sure?". If you do not want to delete the event, click **Cancel**.

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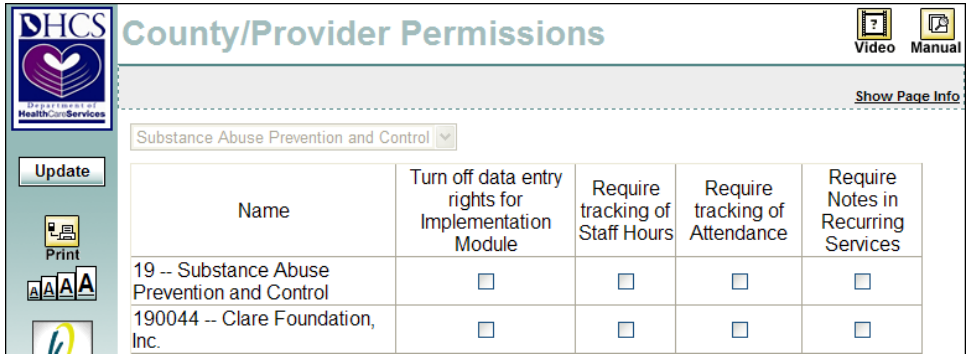
County/Provider Permissions

County Providers can now disable data entry in the Implementation module for their providers. They may also elect to require staff hour tracking. This module is used to suspend data entry privileges and enforce the tracking of staff hours for single and recurring services.

1. Click **Administration** from the main menu.
2. Click **County/Provider Permission** from the submenu.
3. Use the checkboxes to select whether the county/provider has permissions for certain tasks.
4. Click the Update (**Update**) button to save.



(This is a sample screenshot displaying the County/Provider Permissions)

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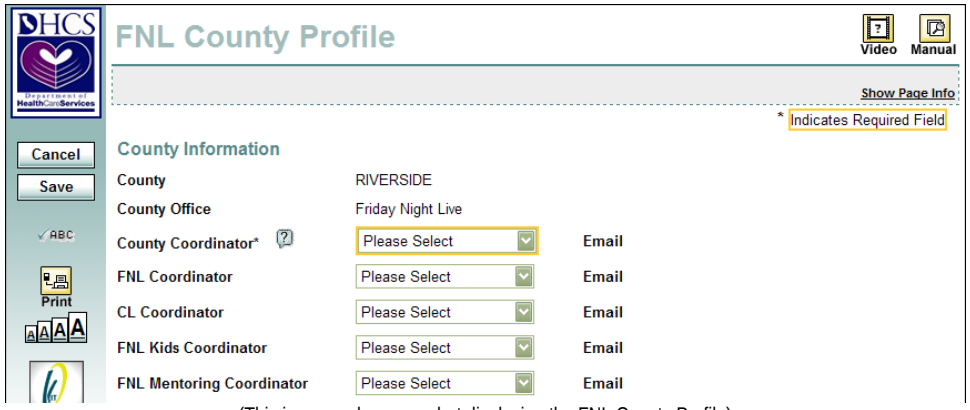
FNL County Profile

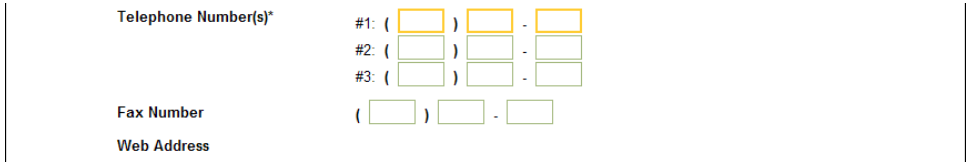
This information is required by the California Friday Night Live Partnership/Collaborative (CFNLP/CFNLC) and must be updated annually at the beginning of each new fiscal year.

1. Click **Administration** from the main menu.
2. Click **FNL County Profile** from the submenu.
3. Click **Add** from the left toolbar.
4. Enter the County Information by selecting the **County Coordinator** from the dropdown list.
5. If applicable, select any/all other coordinators.



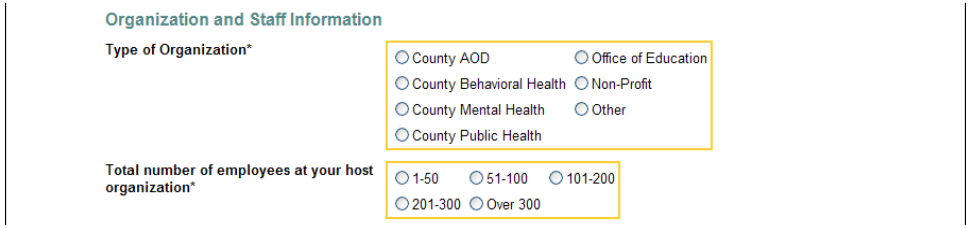
(This is a sample screenshot displaying the FNL County Profile)

6. If applicable, enter the Other Staff/Titles by selecting a staff member from the **Name** from the dropdown list.
7. Enter a contact number in the **Telephone Number(s)** textbox.



(This is a screenshot displaying the FNL County Profile)

8. Enter the Organization and Staff Information by selecting the **Type of Organization** radio button.
9. Select the **Total number of employees at your host organization.**
10. If applicable, enter the **Administrator(s), Contract Signing Authority**, and/or **Coordinator's Direct Supervisor** information.



(This is a screenshot displaying the FNL County Profile)

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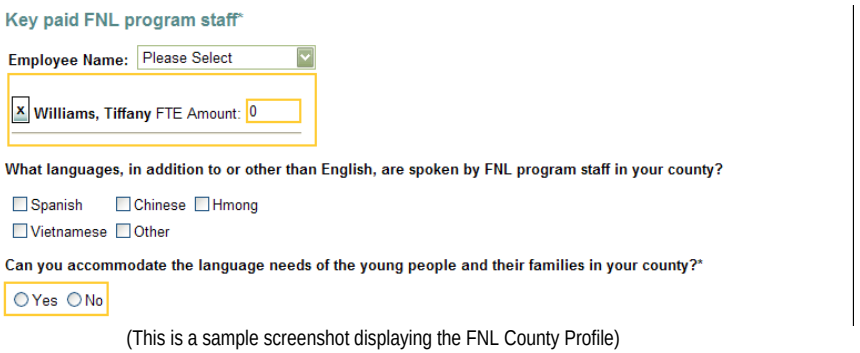
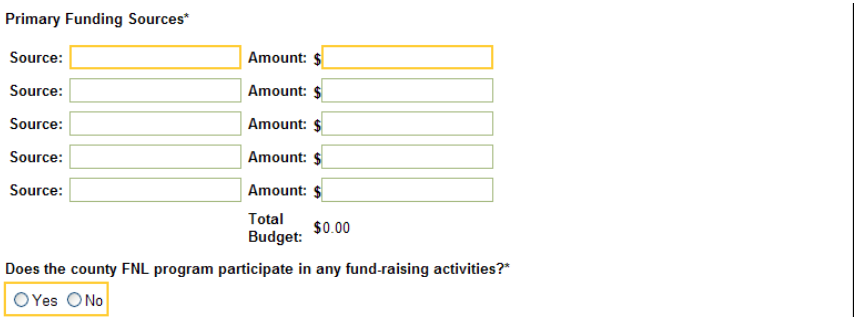
11. Enter the Key paid FNL program Staff by selecting the Employee Name from the dropdown list.
    a. Enter the FTE Amount as a value between 0 and 1.
12. If applicable, answer what languages, in addition to or other than English, are spoken by FNL program staff in our county?
13. Can you accommodate the language needs of the young people and their families in your county?



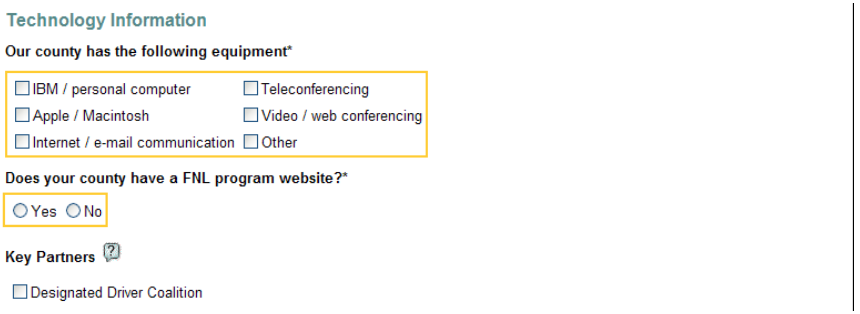
(This is a sample screenshot displaying the FNL County Profile)

14. Enter your funding sources into the Source and Amount into the textbox.
15. Does the county FNL program participate in any fund-raising activities?



(This is a screenshot displaying the FNL County Profile)

16. Enter the Technology Information indicating Our county has the following equipment.
17. Does your county have a FNL program website?
18. If applicable, select the Key Partners.



(This is a screenshot displaying the FNL County Profile)

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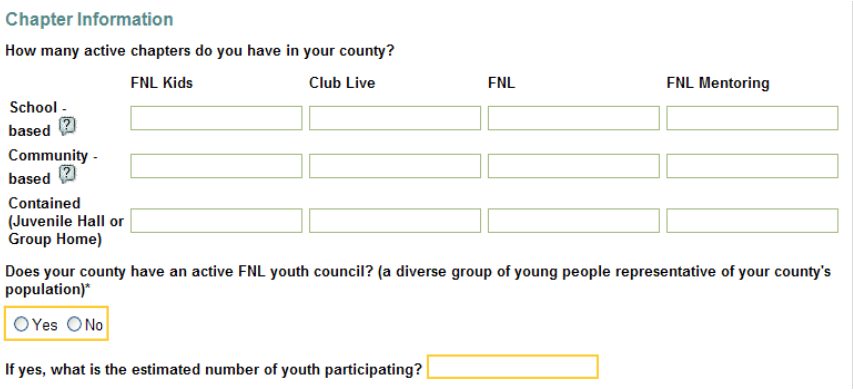
19. If applicable, enter How many active chapter do you have in your county?
20. Use the radio buttons to indicate Does your county have an active FNL youth council? (a diverse group of young people representative of your county's population)
21. If applicable, enter If yes, what is the estimated number of youth participating?
22. Click the Save button.



(This is a screenshot displaying the FNL County Profile)

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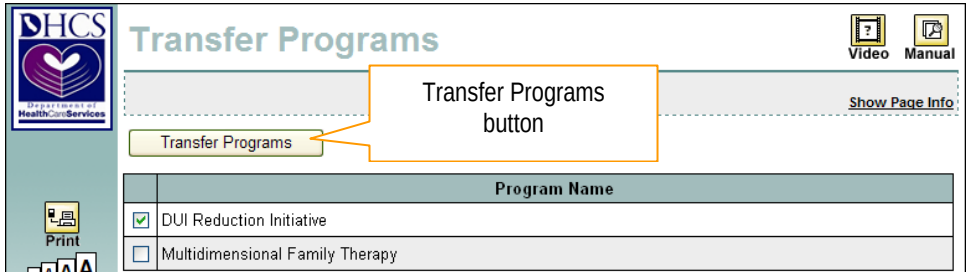
Transfer Tools

Transfer Tools allows you to transfer information from the previous year over to the current year. Information that can be transferred includes programs, participants and identified recurring services.

Transfer Programs

1. Click **Administration** from the main menu.
2. Click **Transfer Tools** from the submenu
3. Click **Transfer Programs** from the category list.
4. Select the **Program Name** you wish to transfer from the list by clicking the check box.
5. Click the

button.
6. If successful you will receive a notification message at the top of the screen once the transfer has been completed.



(This is a sample screenshot displaying the Program Transfer Tools Page. This is a partial screenshot.)

Tips

- Programs must be transferred before attempting to transfer Groups, Individual Participants or Identified Recurring Services.

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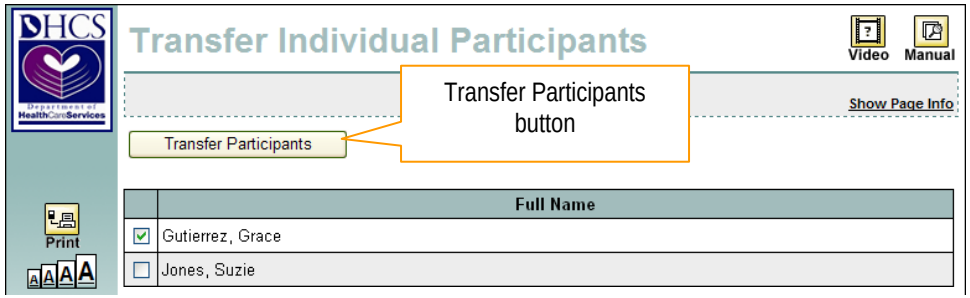
Transfer Participants

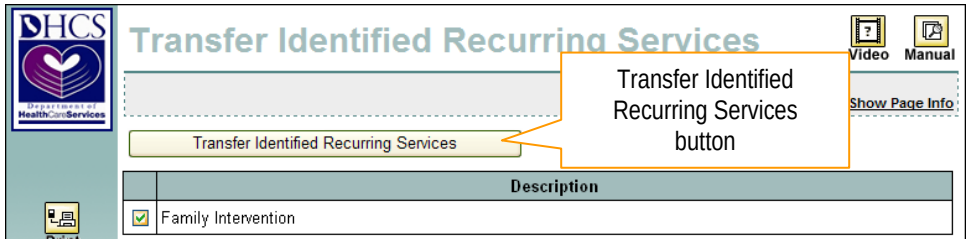
1. Click **Administration** from the main menu.
2. Click **Transfer Tools** from the submenu
3. Click **Transfer Participants** from the category list.
4. Select the **Full Name** you wish to transfer from the list by clicking the check box.
5. Click the Transfer Participants button.
6. If successful you will receive a notification message at the top of the screen once the transfer has been completed.



(This is a sample screenshot displaying the Participants Transfer Tools Page. This is a partial screenshot.)

Transfer Identified Recurring Services

1. Click **Administration** from the main menu.
2. Click **Transfer Tools** from the submenu
3. Click **Transfer Identified Recurring Services** from the category list.
4. Select the **Identified Recurring Service** you wish to transfer from the list by clicking the check box.
5. Click the Transfer Identified Recurring Services button.
6. If successful you will receive a notification message at the top of the screen once the transfer has been completed.



(This is a sample screenshot displaying the Recurring Services Transfer Tools Page. This is a partial screenshot.)

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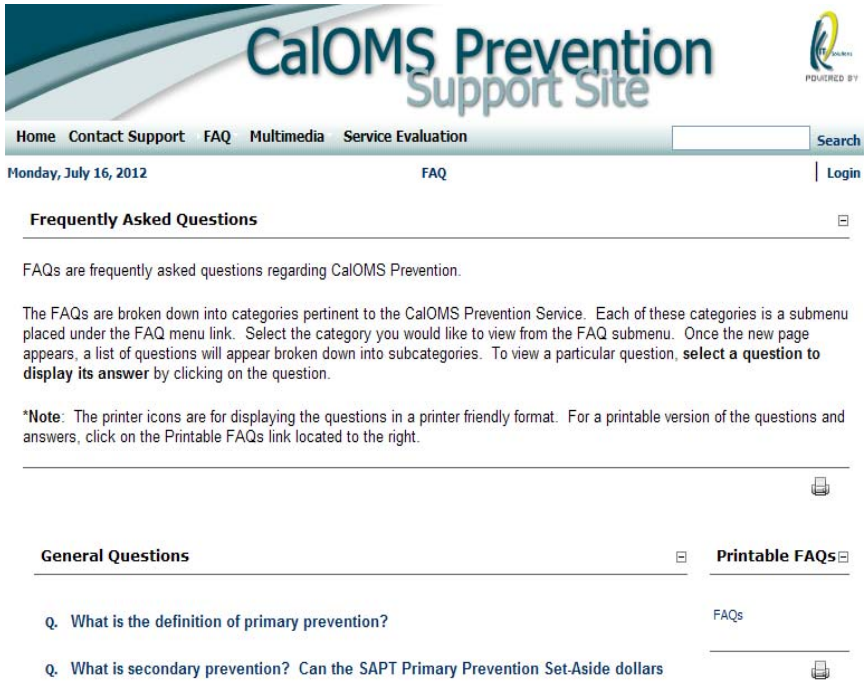
KNOWLEDGE BASE

The Knowledge Base module is a warehouse of prevention related documents, web sites, and CalOMS Prevention service design information (data matrix, service flow charts, etc.) and provides links to the Cal OMS Prevention Support website.

Frequently Asked Questions

The Frequently Asked Questions section has answers to commonly asked questions. To go to the Frequently Asked Questions section, use the following steps:

1. Click **Knowledge Base** from the main menu.
2. Click **Frequently Asked Questions** (FAQ) from the submenu.
3. The CalOMS Prevention Support site opens. For more information, refer to the Support Site section.



(This is a screenshot displaying the Frequently Asked Questions site. This is a partial screenshot.)

Tips

- If you have a pop-up blocker on your computer, hold the Ctrl key down while selecting any button used to view the report (e.g., Show Report, PDF, etc.).

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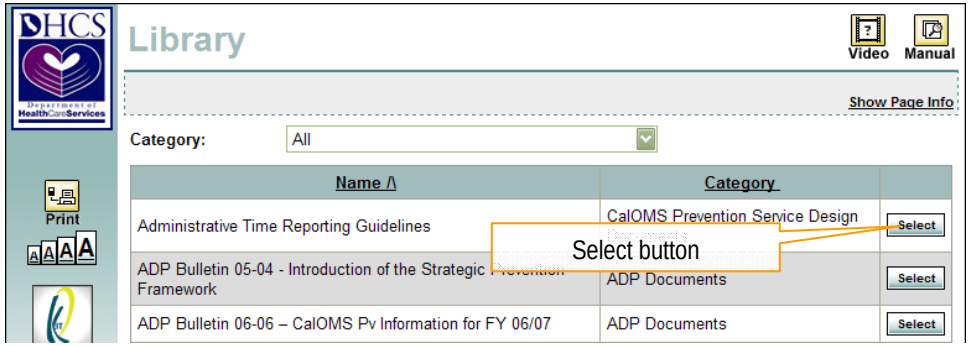
Library

The Library section is a repository of commonly requested documents and other general documents that CalOMS Prevention would like to make available. Use the following instructions to view the documents in the Library section.

1. Click **Knowledge Base** from the main menu.
2. Click **Library** from the submenu.
3. Select the document you would like to view by clicking Select to the right of the document and category name.
    a. To filter through the documents, first select a category from the **Category** dropdown list.
4. The document will open as an Adobe .PDF file.
5. To close the .PDF window, click on the ✕ in the upper right-hand corner.



(This is a screenshot displaying the Library Page. This is a partial screenshot.)

Tips

- If you have a pop-up blocker on your computer, hold the Ctrl key down while selecting any button used to view the report (e.g., Show Report, PDF, etc.).

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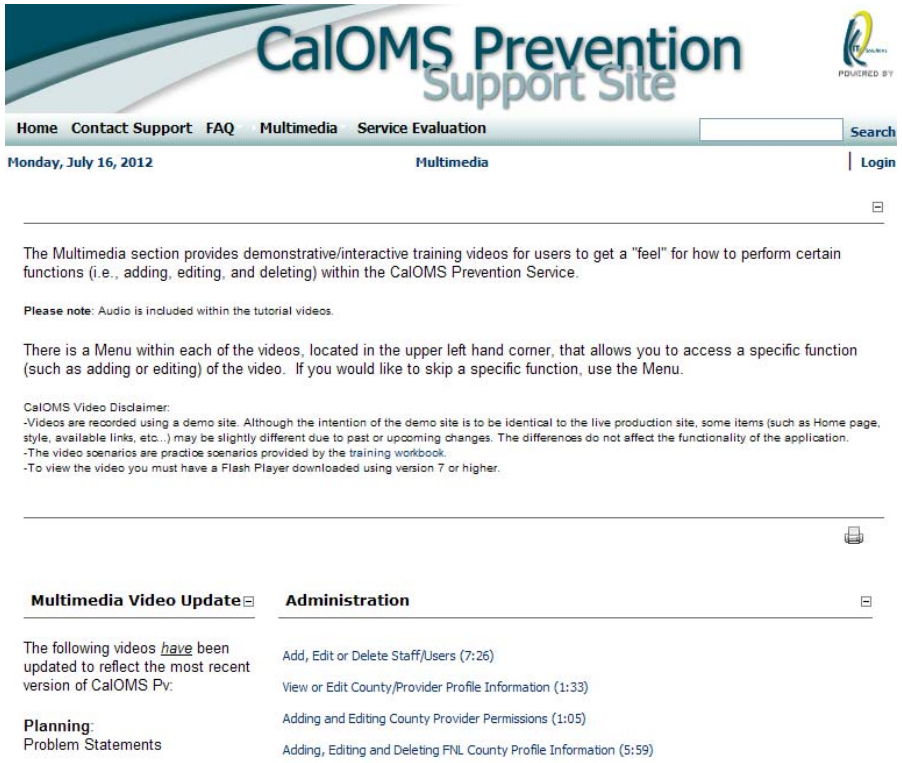
Multimedia

The Multimedia section provides step by step training videos on how to use the CalOMS Prevention Service. To go to the Multimedia section, use the following steps:

1. Click **Knowledge Base** from the main menu.
2. Click **Multimedia** from the submenu.
3. The CalOMS Prevention Support site opens. For more information, refer to the Support Site section.



(This is a screenshot displaying the Multimedia site. This is a partial screenshot.)

Tips

- If you have a pop-up blocker on your computer, hold the Ctrl key down while selecting any button used to view the report (e.g., Show Report, PDF, etc.).

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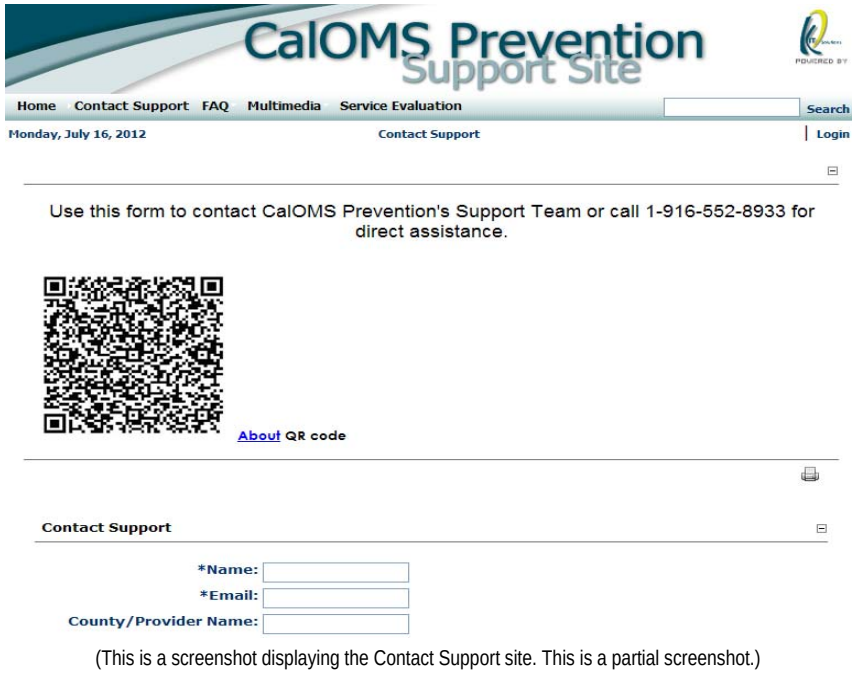
Contact Support

The Contact Support section is a shortcut to contacting Support. To go to the Contact Support section, use the following steps:

1. Click **Knowledge Base** from the main menu.
2. Click **Contact Support** from the submenu.
3. The CalOMS Prevention Support site opens.
    a. Fill in the appropriate fields.
    b. Click the **Submit** button. Your request will be sent to the Support team and DHCS.



(This is a screenshot displaying the Contact Support site. This is a partial screenshot.)

Tips

- If you have a pop-up blocker on your computer, hold the Ctrl key down while selecting any button used to view the report (e.g., Show Report, PDF, etc.).

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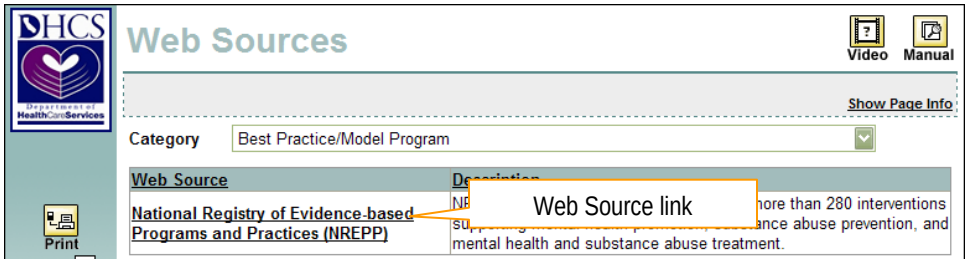
Web Sources

The Web Sources section of Knowledge Base is useful for finding a wealth of prevention links. The Web Sources section can be utilized by following these steps:

1. Click **Knowledge Base** from the main menu.
2. Click **Web Sources** from the submenu.
3. Select a category from the **Choose Category** dropdown list.
4. Browse the *Web Source* list for the web site you would like to visit.
5. Click on the *Web Source* link to open the web site.
   *Note: The link is the underlined *Web Source*.
6. A new window will open displaying the web site you chose.
7. To close the new web site window, click on the ☒ in the upper right-hand corner.



(This is a screenshot displaying the Web Sources Page. This is a partial screenshot.)

Tips

- Due to the web site link opening in a new window, you may be "timed-out" of CalOMS Prevention if viewing the web site for longer than 20 minutes.
- If you have a pop-up blocker on your computer, hold the Ctrl key down while selecting any button used to view the report (e.g., Show Report, PDF, etc.).

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